

# Macquarie Superannuation Non-lapsing death benefit nomination

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281.  
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496.



Use this form to nominate a beneficiary for your superannuation benefits to be paid upon your death.

**Before you make a nomination remember:** You can nominate your legal personal representative and/or one or more of your dependants as defined under superannuation law. Nominations are only valid if the person(s) selected below are eligible at the time of death of the member. If you have insufficient room to list all beneficiaries, please complete an additional Non-lapsing death benefit nomination form and attach to this form. If no valid nomination is made Macquarie will pay your benefit to your Legal Personal Representative as outlined in the Product Disclosure Statement (PDS).

**Important:** If you submit this form electronically, please allow two business days for your request to be assessed by the trustee, and if approved your beneficiary details updated.

Please use black ink and print in CAPITALS. Mark boxes with an [X] where applicable.

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## Personal details

Title:  Account number:

Full name:

If you have more than one account held in Macquarie Superannuation, please list the account numbers that this nomination applies to below. If you do not specify any accounts, your nomination will apply only to the account nominated above, or to the account opened from the application that this form is attached to.

This nomination is to apply to all my existing Macquarie Super and Pension accounts, or

This nomination applies to the accounts listed below:

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## Nomination

**IMPORTANT – BEFORE YOU COMPLETE THIS SECTION:** To establish a valid nomination ensure no alterations are made on this form. Please ensure the death benefits total **100%**.

**Upon my death I direct Macquarie Investment Management Limited (MIML) in its capacity as trustee of the Macquarie Superannuation Plan to distribute my account balance as follows:**

Nominee 1 full name:  LEGAL PERSONAL REPRESENTATIVE (YOUR ESTATE)

Share of death benefit:  %

- If you have nominated **100%** of the benefit allocation to your Legal Personal Representative in the **Share of death benefit** box above, do not complete any further nominations ► **go to section 3**
- If you choose not to nominate your Legal Personal Representative (your estate), please specify **0%** in the **Share of death benefit** box above and complete the following nominee details below

Nominee 2 full name:

Nominee's relationship to you:  Spouse  Child  Interdependant\*  Financial dependant Gender:  Male  Female

Date of birth:  /  /  Is a child pension required?  Yes  No Share of death benefit:  %

Nominee 3 full name:

Nominee's relationship to you:  Spouse  Child  Interdependant\*  Financial dependant Gender:  Male  Female

Date of birth:  /  /  Is a child pension required?  Yes  No Share of death benefit:  %

## Nomination (continued)

Nominee 4 full name: Nominee's relationship to you:  Spouse  Child  Interdependant\*  Financial dependant Gender:  Male  FemaleDate of birth:  /  /  Is a child pension required?  Yes  No Share of death benefit:  %

Unless a child pension has been specified your death benefit will be paid in a form determined by MIML after your death and having consulted your beneficiaries. Where one or more child pensions are specified please also complete a child pension schedule, available from your adviser or [macquarie.com.au](http://macquarie.com.au)

Total death benefits:  %

\* Two persons (whether or not related by family) have an interdependency relationship if:

- they have a close personal relationship, and
- they live together, and
- one or each of them provides the other with financial support, and
- one or each of them provides the other with domestic support and personal care.

If two persons (whether or not related by family) satisfy the requirement of (a); and they do not satisfy the other requirements of an interdependency relationship above; and the reason they do not satisfy the other requirements is that either or both suffer from a physical, intellectual or psychiatric disability; they have an interdependency relationship.

## 3

## Declaration

- Amendments to your nomination **cannot be accepted** (in the event of an error please complete a new form).
- In section 2, the total death benefit must total 100%.
- This form **must** be signed by the member and both witnesses **at the same time**.
- This form cannot be signed under Power of Attorney

- I understand that this nomination will be binding on the trustee if the trustee consents to it and will be valid until they consent to a valid change of nomination from me.
- I understand this nomination replaces any previous nomination/s provided by me to the trustee.
- I understand that if I have revoked a previous nomination and wish to make a new nomination in the future, I will need to complete a new form.

- I agree to retain the original form if I am submitting this form to Macquarie via electronic means and will provide to Macquarie upon request.
- I acknowledge that if my nomination specifies one or more child pensions on behalf of my children that my nomination cannot be accepted by the trustee until a child pension schedule is also completed for each child that I have nominated to receive a child pension.

Signature: Declaration date:  /  /  Title: Name: 

Your signature must be witnessed by two people, each of whom is 18 years or older and is not named as a nominee on the form.

Before me, on the date indicated above as the Declaration Date.

Signature of first witness (in black ink)

Title: Name: 

Before me, on the date indicated above as the Declaration Date.

Signature of second witness (in black ink)

Title: Name: 

**CHECKLIST:** To ensure that your non-lapsing death benefit nomination is processed correctly, please complete the checklist below.

Please ensure you have:

- completed all of your personal details and your beneficiaries' details
- signed and dated the declaration

- your two witnesses' completed details and signatures
- completed a child pension schedule (available from your adviser), if you have nominated a child pension in section 2.

Please complete and return the form to **Macquarie Wrap, GPO Box 4045, Sydney NSW 2001**, or via email to [wrapolutions@macquarie.com](mailto:wrapolutions@macquarie.com) or via fax to **1800 025 175**. If you have any queries about completing this form please contact us on **1800 025 063**.