

# Prime Super nomination of beneficiaries form

Please complete this form to nominate who receives your superannuation benefit in the event of your death.  
Please complete in pen using **BLOCK** letters. Print 'X' to mark boxes where applicable.  
Please provide as much information as possible.



## WHO YOU CAN NOMINATE

### Who can receive your benefit in the event of your death?

You can pay your benefit to:

- your estate; or
- nominated beneficiary(ies); or
- a combination of your estate and your nominated beneficiary(ies).

Any beneficiary you nominate must be either your legal personal representative (i.e. the executor or administrator of your estate) or dependant at the date of your death.

If you nominate your estate or legal personal representative, your benefit will be paid according to your Will (or according to the law of your state or territory if you have no Will).

### Who qualifies as a dependant?

Under Superannuation Law, the people that you are able to nominate to receive your Death benefit are:

- your spouse (including de facto of the same or different sex);
- your children (including biological, step and adopted children, or a child of your spouse);
- any person who is financially dependant on you; and
- any person with whom you have an interdependency relationship including:
  - any person with whom you have a close personal relationship and live with where, one or both of you also provides ongoing financial support, domestic support and personal care; and
  - any person with whom you have a close personal relationship where, because of a disability, the above requirements of living together, financial support, domestic support and personal care are not able to be satisfied.

## TYPES OF NOMINATIONS

You can choose to make a preferred nomination or binding nomination.

### What is a preferred nomination?

- This is a preferred nomination only. The Trustee will take into consideration any nomination you make, however, in this case, the Trustee has final discretion in deciding who will receive your superannuation benefit when you die.
- Should be updated if your circumstances change.
- Requires no witness signatures.

### What is a binding nomination?

- When you make a valid binding nomination, you decide who receives your benefit when you die, and how much of the benefit they receive.
- Will be treated as a binding nomination for three years from the date the nomination is made. This nomination reverts to being a preferred nomination after the three-year period if the nomination is not extended by lodging a new binding nomination request. Prime Super will write to you to notify you when your nomination is due to expire.
- Requires two witness signatures. Witnesses must be aged over 18, must not be one of your nominated beneficiaries and must be present when you sign the form. If the witnesses sign and date the form on a different date from your signature, the nomination will be invalid.
- An invalid binding nomination will be treated as a preferred nomination by the Trustee and will not revoke or replace an existing, valid binding nomination.

**Note:** If you do not make a valid nomination, the Trustee will have final discretion in deciding who will receive your superannuation benefit when you die.

You should refer to the current *Short-Form Product Disclosure Statement (Short-Form PDS) – Superannuation* for more information about who qualifies as a dependant and how to make a binding nomination.



## SECTION 1 – PERSONAL DETAILS

Member Number	Date of Birth (DDMMYYYY)	
<input type="text"/>	<input type="text"/>	
Surname	Title	
<input type="text"/>	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr	
Given Names	Gender	
<input type="text"/>	<input type="checkbox"/> Male <input type="checkbox"/> Female	
Residential Address		
<input type="text"/>		
<input type="text"/>		
Suburb/City/Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Number (BH)	Phone Number (AH)	Mobile Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email		
<input type="text"/>		
Name of Employer		
<input type="text"/>		
Occupation		
<input type="text"/>		







**PART C – DECLARATION**

**Preferred nomination**

I declare that the beneficiaries nominated by me on this form are people who I understand may receive my Death benefit in the event of my death, but I acknowledge that the Trustee of Prime Super is not bound by my nomination.

Full Name

Member Signature

Date (DDMMYYYY)

**OR**

**Binding nomination**

I declare that the beneficiaries nominated by me on this form are people who I understand will receive my Death benefit in the event of my death because the Trustee is bound by my nomination as long as my nomination remains valid. I understand that in order for my nomination to be valid I must:

- ensure that the people nominated by me are considered dependants under Superannuation Law;
- have my nomination witnessed by two individuals who do not benefit from this nomination; and,
- renew my binding nomination every three years.

I acknowledge that if my nomination becomes invalid or expires, the Trustee is not bound by my nomination.

**For binding nominations, you need to sign and date your nomination in the presence of two witnesses.**

Full Name

Member Signature

Date (DDMMYYYY)

**Witness 1**

Witness full name

Witness Signature

Date (DDMMYYYY)

**Witness 2**

Witness full name

Witness Signature

Date (DDMMYYYY)

By completing the above, your witnesses make the following declarations:

- I am at least 18 years of age;
- I am not a person nominated in Section 2; and
- I have witnessed the signing and dating of this form by the member.



**WHERE TO SEND THIS FORM**

Once completed please return this form to us via mail, fax or email.

**Mail** Prime Super  
 Locked Bag 5103  
 Parramatta NSW 2124

**Freecall** 1800 675 839  
**Fax** 1800 023 662  
**Email** administration@primesuper.com.au

If you have any questions about this form or Prime Super please call us on **1800 675 839** (8.00am to 8.00pm Monday-Friday Sydney time).