

max Super Beneficiary Nomination Form



Instructions

- **Black or blue** pen please. We're not into pencil.
- Please use **BLOCK** letters.
- Please place a **tick** in boxes where required.
- Any questions? Please contact the **max Team** on **1300 883 629**.
- When you've completed the application, please sign where indicated and mail to:
max Super
Reply Paid 4678
Melbourne VIC 8060 (no postage stamp required if posted within Australia)

Before you start

Three things can happen with your Super \$\$\$ if you're pushing up the daisies:

- A) If you decide not to make any nominations the Trustee will decide who should get your benefit.
- B) If you make a Non-Binding Nomination, the Trustee *may* consider it, but will not be bound to agree with you when deciding who should receive your benefit.
- C) If you make a Binding Nomination, the Trustee must follow it when paying out your superannuation benefit (provided that you update this nomination every three years).

To make your nomination a binding nomination, don't forget to have two witnesses fill out Step 4.

More legal stuff

Please note that a Binding Nomination will not be valid if at the time of your death:

- 3 years have passed since you made the Binding Nomination (so remember to update every three years!).
- A beneficiary you nominated has died (maybe you were luckier than them?).
- A beneficiary you nominated is not a dependant.
- A court order stops the Trustee from following your Nomination.

Step 1 - Your Personal Details

Let's get started.

max Member Number

Mr/Mrs/Ms/Miss

First Name

Middle Name(s)

Last Name

Gender

Date of Birth

Step 2 - Who should get your super?

Who do you love?

Make sure the people you nominate are eligible!

Your beneficiary has to be either a **dependant** at your time of death (spouse, children, someone who is financially dependant on you, or has an interdependency with you), or a legal personal representative (the executor of your estate). Please refer to the PDS for more information on what defines a **dependant**.

I direct the Trustee of the **max Super** Fund to pay the death benefit payable upon my death to:

Full name of Beneficiary

Relationship

% Share

Step 3 - Your Declaration

Sign here.

Non - Binding Death Benefit Nomination

I have read the Beneficiary Nomination Form and request the Trustee of the **max Super** Fund to accept my Non - Binding Death Benefit Nomination. If you are making a non-binding nomination you can leave out Step 4.

OR

Binding Death Benefit Nomination

I have read the Beneficiary Nomination Form and request the Trustee of the **max Super** Fund to accept my Binding Death Benefit Nomination. I acknowledge that the Binding Death Benefit Nomination is only valid for three years from the date of the nomination. If you are making a binding nomination you will need to complete Step 4.

Signature



Date

D, D / M, M / Y, Y, Y, Y

Step 4 - Witness Declaration

Make it binding.

If you wish this to be a binding nomination, two people need to witness you sign and date the declaration above. They also need to complete the section below. Important: Your witnesses can't be nominated beneficiaries, and the dates must match the date you signed this form.

I declare that:

- I am over 18 years of age
- I am not a nominated beneficiary and my name does not appear in Part 2
- This form was signed by the member in my presence

First Witness

Mr/Mrs/Ms/Miss

First Name

Middle Name(s)

Last Name

Gender

Date of Birth

 M F

Signature

Date



Second Witness

Mr/Mrs/Ms/Miss

First Name

Middle Name(s)

Last Name

Gender

Date of Birth

 M F

Signature

Date



Phew!

You're all done. All you have to do now is mail this to:

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Melbourne VIC 8060
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If you've got any questions just give us a ring on **1300 883 629** and we'll be more than happy to help you.

