Binding Death Nomination of Beneficiaries

ALL SECTIONS MUST BE COMPLETED | PLEASE ☒ NOT ☒ | PLEASE USE BLOCK LETTERS

ARE YOU A CURRENT MEMBER OF SPEC Super
☐ YES ☐ NO

SPEC Super MEMBER NUMBER

Note: if you have changed your name since first becoming a member please attach a Certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

PERSONAL DETAILS

DATE OF BIRTH / /

TITLE ☐ MR ☐ MS ☐ MRS ☐ MISS

GENDER ☐ MALE ☐ FEMALE

FIRST NAME

MIDDLE NAME

FAMILY NAME

RESIDENTIAL ADDRESS

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

P/CODE

POSTAL ADDRESS (If same as above, write "as above")

PO NUMBER

SUBURB/TOWN

STATE

POSTCODE

EMAIL AND PHONE DETAILS

EMAIL ADDRESS

SECOND EMAIL ADDRESS

YOUR TELEPHONE NUMBER ( ) -

MOBILE NUMBER

PART B - BINDING DEATH NOMINATION OF BENEFICIARIES

A binding Death Nomination allows you to nominate one or more beneficiaries to receive your benefits in the event of your death. All nominations must have two witnesses who are at least age 18 and who are not nominated as beneficiaries. Your nomination will be binding on SPEC Super in the event of your death if it meets the conditions outlined on this form and is accepted and approved by the Trustee.

Nomination Status: ☐ New Nomination ☐ Amendment ☐ Cancel Nomination ☐ Confirm existing Nomination

In the event of my death, I direct the Trustee of SPEC Super to pay my death benefit from SPEC Super in accordance with the following directions:

Surname	Given Name	Date of Birth	Relationship	% Allocation

Total must equal 100% or this nomination will not be valid. When making a decision on the beneficiary(s) you wish to nominate please read the important information overleaf. If your nomination does not meet these conditions it will be invalid and your death benefit will be dealt with in accordance with the Trustee's decision based on the information received at the time of your death.

SPEC(QLD) PTY. LTD. (ABN 60 010 743 405, AFSL No. 325 122) is the Trustee of SPEC Super (ABN 45 404 406 059)

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IMPORTANT INFORMATION

Once you have made your nomination and the fully completed form has been received by the Trustee the nomination is legally binding so long as it remains valid. The Trustee of SPEC Super must act in accordance with your nomination of beneficiaries. There is strict Government legislation on how a binding nomination of beneficiaries must be made, amended or revoked by a member. Please note the following conditions that apply to binding nominations of beneficiaries:

- Nominations, amendments and cancellations can only be accepted on a form which is approved by the Trustee. This form is an approved form.
- A beneficiary must be your legal personal representative (the executor or administrator of your estate) or a Dependant.
- **Dependant** is defined as:

- A Spouse of the member (including defacto spouse or same sex partner – see full definition below); or

- Children (including an adopted child, step-child, ex-nuptial child, a child of the person's spouse, or someone who is a child of the person within the meaning of the Family Law Act 1975); or

- A person with whom you have an interdependency relationship; or

- Any other person the Trustee considers dependent on you for maintenance and support at the time of your death.

Spouse of a person *includes*:

(a) another person (whether of the same or a different sex) with whom the person is in a relationship that is registered under a law of a State or Territory; and

(b) another person who, although not legally married to the person, lives with the person on a genuine domestic basis in a relationship as a couple.

- An **interdependent person** is a person that you:

- Have a close personal relationship with;

- Live with;

- Provide with financial support, or they provide you with financial support; and

- Provide domestic support and personal care; or they provide you with domestic support and personal care

Interdependency can also arise between two people who have a close personal relationship but do not live together or provide each other with financial or domestic support because of physical, intellectual or psychiatric disabilities.

- For each beneficiary you must specify the proportion of your benefits they are to be paid. The total benefit must have been allocated by you on this form. If your allocation does not total 100% the entire nomination will be invalid.
- The nomination must be signed by you and two witnesses, both of whom must be at least 18 years of age and not nominated as beneficiaries
- Your initial nomination will remain current for three years from the date it is made unless you amend or revoke it before that date. Each year the Trustee will notify you of the details of your nomination and its expiry date with your Member Statement.
- Your current nomination may be amended at any time by submitting a new approved form to the Trustee. If an amendment is made, the nomination will be valid for three years from the date the amendment is made.
- Where you do not nominate a beneficiary, your nomination has expired or has been cancelled or is otherwise invalid, the Trustee will consider that no vaild nomination applies. In this event, the Trustee will pay your death benfits in accordance with the SPEC Super Trust Deed.
- It is your responsibilty to keep your nomination up to date and confirm it every three years. Where your nomination is valid and in effect at the date of your death, the Trustee must pay your death benefits in accordance with your nomination. If your personal circumstances change or if your nominated beneficiaries change (e.g. if a nominated beneficiary dies or you become separated or divorced) you should complete a new form.
- If your nominated beneficiary is under the age of 18 years the Trustee of SPEC Super may pay this benefit to a guardian to use for the maintenance, support or advancement of your nominated beneficiary. Alternatively, the Trustee of SPEC Super may forward this benefit to the Public Trustee to hold in trust until the nominated benficiary attains the age of 18.
- Before entering into a binding death nomination you should seek professional advice to understand the tax consequences and consider the suitability of the nomination for your specific needs.

The information in this form is general information only and does not take into account individual objectives, financial situations or needs.

PART C - INDEPENDENT WITNESS

Witness A - I declare that this Declaration was signed and dated by the member in my presence and that I am aged 18 or over and am not a nominated beneficiary of the member.

FULL NAME OF WITNESS A

SIGNATURE OF WITNESS A

DATE OF BIRTH OF WITNESS / /

DATE WITNESSED / /

Witness B - I declare that this Declaration was signed and dated by the member in my presence and that I am aged 18 or over and am not a nominated beneficiary of the member.

FULL NAME OF WITNESS B

SIGNATURE OF WITNESS B

DATE OF BIRTH OF WITNESS / /

DATE WITNESSED / /

NOTE: Member must sign and date this form in the presence of two witnesses.

I declare that:

· I have read the information in the PDS regarding privacy and understand how the Trustee intends to protect and use the information that I send them

· I have read and understand the Important information above contained in the Binding Death Nomination form

· I will notify the Trustee immediately if my circumstances change and make any necessary changes to my Binding Death Nomination

SIGNATURE OF MEMBER

DATE SIGNED / /

RETURN COMPLETED FORM TO: SPEC SUPER PO BOX 1109 MILTON QLD 4064

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