

## CHANGE OF MEMBER DETAILS

### MEMBER'S NEW DETAILS

Please complete your current details.

Member Number  Date of Birth  /  /

Title  Mr  Mrs  Ms  Miss  Dr

Given Name(s)  Surname

Street

Suburb  State  Postcode

Telephone Number (Day)  Mobile Number

Email Address

Tax File Number

We are authorised to collect your tax file number (TFN) under the law for approved purposes. For example, to calculate tax on benefits, matching with the Taxation Office or to provide it to another fund on rollover. You don't have to provide your TFN and declining to provide it is not an offence. If you do not provide your TFN, you may pay more tax on benefits or contributions than you have to and the additional tax may be re-claimed through the tax return system.

### MEMBER'S OLD DETAILS

Please complete if your name has changed and **attach proof** eg. copy of Marriage Certificate if applicable.

Title  Mr  Mrs  Ms  Miss  Dr

Former Given Name(s)

Former Surname

Former Signature

Street

Suburb  State  Postcode

Telephone Number (Day)  Mobile Number

Email Address

### CHANGE OF BENEFICIARY

*To change your beneficiaries please read the details and complete the form on the reverse page.*

By signing this form, you consent to the collection, use and disclosure of my personal and sensitive information under the Privacy Act 1988.

Date  /  /

Member's Current Signature

## CHANGE OF BENEFICIARY

Please take the time to read the definitions below before you make a nomination. Auswide allows you to make two types of beneficiary nominations; Binding or Preferred.

Please tick what type of nomination you are making:  **BINDING**  **PREFERRED**

Complete details of your beneficiaries below with relevant percentages for each. Death benefits will be paid in accordance with valid Binding Nominations. It is a legal requirement to renew binding nominations every 3 years. Auswide will send you a reminder when your renewal is due.

Given Name(s)	<input type="text"/>	Surname	<input type="text"/>
Address <input type="text"/>			
Relationship	<input type="checkbox"/> Spouse	<input type="checkbox"/> Child	<input type="checkbox"/> Other (please specify) <input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Percentage to be paid	<input type="text"/>
Given Name(s)	<input type="text"/>	Surname	<input type="text"/>
Address <input type="text"/>			
Relationship	<input type="checkbox"/> Spouse	<input type="checkbox"/> Child	<input type="checkbox"/> Other (please specify) <input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Percentage to be paid	<input type="text"/>
Given Name(s)	<input type="text"/>	Surname	<input type="text"/>
Address <input type="text"/>			
Relationship	<input type="checkbox"/> Spouse	<input type="checkbox"/> Child	<input type="checkbox"/> Other (please specify) <input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Percentage to be paid	<input type="text"/>
<input type="checkbox"/> Legal Personal Representative (to be distributed with my Will or relevant Intestacy laws)	Percentage to be paid		<input type="text"/>
			<b>TOTAL 100%</b>

Please attach a separate sheet if you need to make more than three nominations.

**IF YOU HAVE MADE A BINDING NOMINATION, YOU AND TWO APPROPRIATE WITNESSES, AGED 18 YEARS OR MORE, MUST SIGN BELOW:**

Signature of witness  Date  /  /

Signature of witness  Date  /  /

We declare that the Member signed and dated this form in our presence and we are not the dependants.

Member's signature  Date  /  /

**IF YOU HAVE MADE A PREFERRED NOMINATION, PLEASE SIGN BELOW:**

Member's signature  Date  /  /

## TYPES OF BENEFICIARY NOMINATIONS

### BINDING BENEFICIARY

If you wish to ensure that any remaining account balance on your death is paid to your nominated beneficiary, you may choose to nominate a 'binding' beneficiary. Extreme care must be taken with your understanding of this option.

Your binding beneficiary **must be** a dependant or your legal personal representative (who is usually the executor of your estate).

For this purpose, these terms mean:

- 1 A **dependant** includes your spouse (including defacto) and children, any person with whom you had an interdependency relationship immediately prior to death OR any person who **at the time** of your death, and in the Trustee's opinion, was wholly or partially financially dependent on you.
- 2 An **interdependency relationship** is defined as a close personal relationship between two people (regardless of gender) who live together and one or each of them provides the other with financial and domestic support. If either person is disabled, an interdependency relationship may still exist where they live apart.

If on your death, the Trustee finds it is unable to verify your nominee as your legal personal representative or a dependant, your nomination will be declared invalid, and the Trustee is then required to fully review to whom your account is paid. This includes consideration of payment to your legal representative.

Your nomination must be signed, dated, and witnessed by 2 independent adults (at least 18 years old), not including any beneficiaries. The witnesses must also sign the declaration affirming that your notice was signed in their presence. If you nominate more than one person, who can include your legal personal representative, you must state the proportion that you wish to be paid to each person.

Binding nominations must be updated every 3 years in order to be valid.

### PREFERRED BENEFICIARY

You may not wish to make a formal binding nomination, with the responsibility to update every 3 years. If so, an ordinary nomination can be made. While it is not formally binding, the Trustee will take into account your nomination, together with any other factors which are relevant at the time of your death. It may be that your circumstances have changed since your nomination and the Trustee may take the changed circumstances into account when making their decision.

The Trustee's remain bound by the Trust Deed in making their decision, which states that your account may only be paid to dependants, or to your legal personal representative (for management of your estate). The decision is made at the Trustee's discretion.

*At all times, please ensure that you have an up-to-date Will that reinforces your wishes.*

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