

Australian Expatriate Superannuation Fund

Reversionary Beneficiary Nomination

Form **17**

2. Your nominated reversionary beneficiary details

Title	Mr	Mrs	Ms	Miss	Other
Date of birth [dd/mm/yy]					
Name [first name, middle, surname]					
Residential address					
[Your residential address cannot be a Post Office Box]	Unit number	Street number		Street name	
		Suburb		State	Postcode
Postal address					
[If different to your residential address. Your postal address cannot be your Financial Adviser's address]	Post Office Box number				
		Suburb		State	Postcode
Email address 1					
Email address 2					
Mobile number			Work number		
Home number					

3. Relationship to you

Spouse Child Financial Dependant Independent Relationship

4. Important Notes

Who can you nominate?

Under superannuation law, you can nominate:

Individuals

- your spouse or de-facto spouse, including same sex partner
- children [including step and adopted children, children of your spouse and other children within the meaning of the Family Law Act 1975]
- individuals who are financially dependent on you at the time of your death
- someone in an interdependency relationship with you at the time of your death.

Legal representative [your estate]

Your legal representative - ie the executor under your will or a person granted letters of administration for your estate if you die without having left a valid will.

Why can't you nominate other family members or friends?

The law only allows you to nominate individuals who are your spouse, your children, who are otherwise financially dependent on you or who have an interdependency relationship with you at the time of your death. However, you can choose to nominate to have all or part of your benefit paid to your estate and then via your will your friends and/or other family members can become entitled to receive these superannuation funds.

What is a financial dependant?

Someone who is financially dependent upon you at the time of your death. The definition of a dependant under superannuation legislation may be different to the definition which is used for tax purposes regarding how much tax the recipient of the benefit will be required to pay. For more information on estate planning we recommend you speak with your financial or legal adviser.

What is an interdependency relationship?

This is a close personal relationship between two people who live together, where one or both of them provide for the financial and domestic support and personal care of the other. This type of relationship may exist if there is a close personal relationship but the other requirements are not satisfied because of some physical, intellectual or psychiatric disability.

Where can you check your beneficiary nomination?

Your beneficiary nomination details will be confirmed each year in your Annual Statement and can be viewed online at any time on [aesf.com.au](https://www.aesf.com.au)

When complete
email and post this form:

australia@ivcm.com
IVCM (Aust) Pty Ltd
Level 10
20 Martin Place
Sydney, NSW, 2000

Your reversionary beneficiary must be a dependant at the time of the nomination and at the time of your death to be valid.

5. Declaration

1. This request removes all previous nominations of reversionary beneficiary(s) for my pension. I therefore provide the authority to the Trustees.
2. I understand I can only nominate one of my dependants to be a reversionary beneficiary.
3. I understand that the nominated dependant beneficiary but be an eligible and valid beneficiary at the date of my death.
4. I fully understand that its my responsibility to ensure the reversionary beneficiary is valid.
5. I am aware I can remove or amend my reversionary beneficiary at any time as I am the member.
6. I understand that where my reversionary beneficiary is invalid at the date of my death, the Trustees may pay my benefits to one or more of my dependants or legal representatives at their own discretion.

MEMBERS FULL NAME IN BLOCK CAPITALS (black ink)

SIGNATURE OF MEMBER

Date [dd/mm/yy]