


aware
super



- This form can be used for all Aware Super accounts except for Lifetime Pension accounts.
- A lapsing binding death benefit nomination is valid for three years from the date it is signed by you and your witnesses.
- If you are making a new binding nomination, this will cancel any previous binding or non-binding nomination made.
- For your nomination to be valid, your form must have all relevant sections fully completed, and have been correctly witnessed and received by the Trustee before your death. Only originals of this form, without alteration, will be accepted. If you make a mistake, you should complete a new form.

 You **MUST** select one of the options in Step 1. If you select more than one option or no option at all, your form will not be accepted.

Please select (X) one of the options below:

- [^] If you are a Future Saver NSW Police Officers or Future Saver Ambulance Officers member, no need to complete Step 3 – just complete Step 4.

 * Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

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Page 10 of 10

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i If you have a Future Saver NSW Police Officers or a Future Saver Ambulance Officers account, you do not need to complete Step 3. Please complete Step 4 to provide your account number/s to which your nomination applies.

Step 3: Select the Aware account/s for which this nomination applies

Please select (X) one of the options below:

- ☐ Apply to all my Aware Super accounts, **OR**
☐ Apply to my below account number/s only

Account number/s

OR ☐ New account

Note: You cannot make a binding death benefit nomination on an existing Retirement Income or Term Allocated Pension account if there is already a reversionary nomination in place. If you would like to make a binding nomination, you must first cancel the existing reversionary beneficiary nomination on your account by completing the *Make, amend or cancel a reversionary beneficiary nomination (V211)* form.

Step 4: Future Saver NSW Police Officers and Future Saver Ambulance Officers account/s for which this nomination applies

This step is to be completed by Future Saver NSW Police Officers or Future Saver Ambulance Officers members only.

If you are a Future Saver NSW Police Officers or Future Saver Ambulance Officers member, your nomination will apply to your compulsory insurance account **and** any Future Saver NSW Police Officers or Future Saver Ambulance Officers superannuation account you hold. You cannot make a separate nomination for each account. If you have both accounts, you can nominate either account number for the nomination to apply across both your accounts. Please provide either your Future Saver NSW Police Officers or Future Saver Ambulance Officers account number:

Account number

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i You must choose the 'Relationship' for every beneficiary selected.

Step 5: Make or amend a death benefit nomination

You can choose to have your death benefit paid to your **legal personal representative** and/or one or more **dependants** or a combination of both. If you are nominating multiple beneficiaries, the proportions must add up to 100% and must be in whole numbers, we cannot accept fractions or decimals.

Full name

Portion of benefit %

Beneficiary #1

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 %

Relationship Please select (X)

- ☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

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Contact phone number

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Beneficiary #2

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 %

Relationship Please select (X)

- ☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

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Contact phone number

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Beneficiary #3

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 %

Relationship Please select (X)

- ☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

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Contact phone number

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You must choose the 'Relationship' for every beneficiary selected.

Step 5: Make or amend a death benefit nomination (continued)

Beneficiary #4

%

Relationship Please select (X)

☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

Contact phone number

Beneficiary #5

%

Relationship Please select (X)

☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

Contact phone number

Beneficiary #6

%

Relationship Please select (X)

☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

Contact phone number

Beneficiary #7

%

Relationship Please select (X)

☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

Contact phone number

Beneficiary #8

%

Relationship Please select (X)

☐ Spouse/de facto ☐ Child ☐ Interdependant ☐ Financial dependant

Date of birth (DD-MM-YYYY)

Contact phone number

AND/OR

My Legal Personal Representative (My Estate)

%

TOTAL

%


We must receive your nomination in writing prior to your death for it to be valid.

Step 6: Cancel your existing death benefit nomination

If you cancel your existing death benefit nomination without making a new death benefit nomination, in the event of your death, the Trustee will decide how to pay your death benefit based on super law and the fund rules. For more information refer to the **Notes** section of this form.

☐ I wish to cancel my current death benefit nomination on the following account/s

Account number/s

Note: If you have an existing reversionary beneficiary nomination on your Retirement Income or Term Allocated Pension account that you wish to cancel, you need to complete the *Make, amend or cancel a reversionary beneficiary nomination* (V211) form.

Step 7: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **aware.com.au/privacy** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.



Note: This form must be signed by the member and cannot be signed by any third party, including a power of attorney.

Step 8: Declaration

I declare and acknowledge that

- I have read and understood the information sheet in the **Notes** section of this form.
- I have read the relevant Product Disclosure Statement (PDS), including the privacy information.
- I understand that it is my responsibility to ensure my nomination remains valid and continues to reflect my wishes.
- I understand that by making a new nomination, I am canceling my existing lapsing binding or non-binding nomination.
- I understand that this nomination is binding and if valid at the time of my death, the Trustee must pay my death benefit to my nominated dependant/s and/or legal personal representative as specified on this form where practical.
- I acknowledge that my beneficiaries and I will be bound by the provisions of Aware Super's Trust Deed, and that Aware Super accepts no responsibility for the correct nomination of beneficiaries.
- If I have made a lapsing binding nomination, I understand that my nomination will lapse after three years from the date I sign this form.
- I understand that if this nomination is invalid or has not been received by Aware Super prior to my death, the Trustee will decide how to pay my death benefit based on super law and the fund rules.
- If I have made this nomination as a Future Saver NSW Police Officers or Future Saver Ambulance Officers member, I understand that this nomination will apply to my compulsory insurance account and any Future Saver NSW Police Officers or Future Saver Ambulance Officers superannuation account I hold.



Please hand write your signature in blue or black pen. We are unable to accept digital signatures on this form.

Member Signature*

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Date signed* (DD-MM-YYYY)

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This MUST be the same date the form is witnessed

i Ensure the same signature date is shown for you and your witnesses. We are unable to accept your form if it contains whiteout or alterations.

i Ensure that you have signed your nomination in the presence of two witnesses and the **same date** is shown by each signature.

e Post the form to this address.

Step 9: Witness declaration

Two witnesses must complete the declaration below and sign where indicated, declaring that the member signed this form in their presence.

I declare I am age 18 or over, not named as a beneficiary on this form and the member signed and dated this form in my presence.

Witness 1

Signature*

Date signed* (DD-MM-YYYY)

This MUST be the same date the form is signed by the member.

First name* (print in CAPITAL letters)

Last name* (print in CAPITAL letters)

Witness 2

Signature*

Date signed* (DD-MM-YYYY)

This MUST be the same date the form is signed by the member.

First name* (print in CAPITAL letters)

Last name* (print in CAPITAL letters)

Step 10: Where to post your completed form

Please post the completed form to:

Aware Super
Reply Paid 89
MELBOURNE VIC 8060

In case you need any further assistance, please contact our Member Support Team on 1300 650 873.

Proof of identity

Have you changed your name?

If you have changed your name we must obtain and verify your previous full name and new full name against **certified copies** of linking documents displaying both names, such as:

- From Birth, Death's and Marriages Registration Office:
 - marriage certificate (ceremonial certificate is not accepted)
 - relationship certificate
 - change of name certificate
 - birth certificate displaying previous names
 - statutory declaration linking both names and clearly outlining the intention

If you have reverted to your maiden name, we will require your marriage certificate, showing your maiden name and your married name.

- Deed poll

Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

Proof of identity

Any change of name, correction to your date of birth, change of bank account, update to your mobile number or providing an overseas address we have recorded for you must be supported by **proof of identity** (POI) documentation.

Providing certified proof of your identity is a three-step process

1 Collect your originals

Collect your proof of identity document(s). We have listed the documents you can use below.

2 Photocopy your originals

3 Have your copies certified

Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

Either:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.[^]
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier[^]

Or:

One certified document from this list:

- A birth certificate issued by a state or territory of Australia, by a foreign government, or by the United Nations or an agency of the United Nations[^]
- A citizenship certificate issued by the Commonwealth or a foreign government[^]
- A current Centrelink pension card that entitles you to receive financial benefits

AND

One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- If you're under 18, you can provide a student card, or a letter from a school principal. The letter must include the date it was issued (within three months of providing your proof of ID), your name, residential address and the dates you attended the school.

[^] If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "Certified to be a true copy of the original seen by me", followed by their signature, printed name, address (personal or professional), qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date. In the case of a multiple page document, the authorised certifier must certify all pages by repeating the above steps on each page and including the numbering of each page (1 of 25).

If you are in Australia

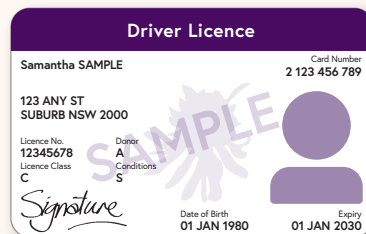
The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at www.ag.gov.au.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

Samantha Sample has provided a copy of her identification. It includes her **signature, full name, date of birth and current residential address.**

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



I certify that this document is a true copy of the original.

K Anderson

Name: Kate Anderson

Address: 6 Some St Suburb NSW 2000

Qualification: JP

Registration no: 123456

Date: 1 October 2023

i If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

Overseas residents

If you change your address to an overseas address, reside overseas or direct Aware Super to make your payment to an overseas address, you must provide verification proof.

What proof of identity information must be provided?

A passport issued by the Commonwealth,

OR

A passport or a similar document issued for the purpose of international travel, that:

- a. contains a photograph and the signature of the person in whose name the document is issued
- b. is issued by a foreign government, the United Nations or an agency of the United Nations, and
- c. if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

AND

one of the following:

- a. a licence or permit issued under the law or equivalent authority of a foreign country for the purpose of driving a vehicle that contains a photograph of the person in whose name the document is issued and contains their residential address, or
- b. a notice that:
 - was issued to an individual by a local government body or utilities provider within the preceding three months
 - contains the name of the individual and his or her residential address, and
 - records the provision of services by that local government body or utilities provider to that address or to that person.

What is a binding nomination?

A binding death benefit nomination gives you certainty about who will receive your superannuation benefit in the event of your death. If there is a valid binding death benefit nomination on a member's account at the time of their death, the Trustee is required by law to pay those beneficiaries and/or Legal Personal Representative (LPR) the death benefit. Lapsing binding nominations are subject to specific legislative conditions and witnessing formalities.

Note: It is important that you update your binding death benefit nomination if there is a significant change to your family circumstances. This will ensure that your nomination continues to reflect your wishes. Significant changes may include the death of a dependant, the birth of a child or the end of a relationship. Your binding death benefit nomination will generally remain valid despite a change in your circumstances. Therefore, if you do not update your nomination, it may no longer reflect your wishes.

Who can I nominate as a beneficiary?

For your nomination to be valid, you can only nominate a person or persons who are classified as **dependants for superannuation purposes or your LPR**. The nomination will only be valid if the person is still a dependant at the time of your death and/or if an estate exists.

Who is considered an LPR?

An LPR is either an executor named in your Will who is able to be granted Probate or the administrator of your estate (where there is no Will), who has been granted Letters of Administration.

Who is considered a dependant?

A dependant for superannuation purposes includes, your spouse or de facto spouse, children and anyone who is wholly or partially financially dependent on you, or in an interdependency relationship with you, when you die.

Spouse is someone (regardless of gender) with whom you are in a relationship that is registered under a law of a State or Territory, or another person who, although not legally married to you, lives with you on a genuine domestic basis in a relationship as a couple.

Child includes an adopted child, a stepchild or an ex-nuptial child, a child of your spouse, and someone who is your child within the meaning of the Family Law Act 1975.

A **financial dependant** is someone who relies on you to help them meet their daily living expenses such as utility and household expenses, rent and shared financial commitments like mortgage repayments or other loans.

An **interdependency relationship** may exist between two people if:

- they have a 'close personal relationship'; and
- they live together; and

- one or each of them provides the other with financial support; and
- one or each of them provides the other with domestic support and personal care of a type and quality normally provided in a close personal relationship, rather than by a mere friend or flat mate

OR

- they have a 'close personal relationship'; and they do not live together, nor provide each other with financial support, nor provide each other with domestic support and personal care because one or both suffer from a disability

OR

- they have a 'close personal relationship'; and
- they do not live together, nor provide each other with domestic support and personal care because they are temporarily living apart.

A 'close personal relationship' is one that involves a demonstrated and ongoing commitment to the emotional support and wellbeing of the two parties. Two persons do not have an interdependent relationship if one of them provides domestic support and personal care to the other:

- under an employment contract or a contract for services; or
- on behalf of another person or organization such as a government agency, a body corporate or a benevolent or charitable organisation.

For more detailed information please read the relevant sections in the Product Disclosure Statement and Handbooks applicable to your membership (available at aware.com.au).

VicSuper Beneficiary Accounts before July 2002

If you have a VicSuper Beneficiary Account that was opened in the Victorian Superannuation Fund before 1 July 2002, a legislative requirement at that time stipulated that death benefits would be paid to your LPR in the event of your death. This still applies unless you elect otherwise. By completing this form and signing the declaration, you are imposing a new binding instruction on the Trustee to distribute your super benefits as you have set within this form.

Future Saver NSW Police Officers and Future Saver Ambulance Officers

If you are a Future Saver NSW Police Officers or Future Saver Ambulance Officers member, this nomination will apply to your compulsory insurance account **and** any Future Saver NSW Police Officers or Future Saver Ambulance Officers superannuation account you hold. You cannot make a separate nomination for each account. You can nominate either account number for the nomination to apply across both your accounts (if applicable).