

Shadforth Portfolio Service – Pension

1 August 2018

Non-Binding Death Benefit Nomination

Please complete this form to make a new (or to amend or revoke an existing) Non-Binding Death Benefit Nomination. You should read the section Dependants – paying benefits if you die in the PDS before completing this form.

Please complete these instructions in BLACK INK using CAPITAL LETTERS (except for your email address) and ✓ boxes where provided.

Step 1: Member/Applicant details

Account number (if known)	<input type="text"/>									
Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname	<input type="text"/>							
Given name(s)	<input type="text"/>									
Residential address	<input type="text"/>									
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>					
Mailing address (if different from above)	<input type="text"/>									
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>					
Phone (work)	<input type="text"/>	<input type="text"/>	Phone (mobile)	<input type="text"/>	<input type="text"/>					
Email	<input type="text"/>									
Date of birth	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	Gender	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>

You must complete a separate Non-Binding Death Benefit Nomination form for each account that you hold.

Step 2: Nomination

Nomination status New nomination Amendment Revocation (remove any existing beneficiaries)

In the event of my death, I request the Trustee to pay my benefit in accordance with the following nomination:

- to nominate one or more Dependants complete Part A
- to nominate a Legal Personal Representative complete Part B
- to nominate both a Dependant(s) and a Legal Personal Representative complete Parts A and B and ensure that the total of Part A and Part B add up to 100%
- to nominate more than four Dependants, please complete a second form and clearly state that the second form is a continuation of the first.

Please note: Your Non-Binding Death Benefit Nomination is not binding on the Trustee but will be taken into consideration by the Trustee when it determines whom to pay your death benefit. If you wish your nomination to be binding on the Trustee you will need to complete a Binding Death Benefit Nomination Form.

Step 3: Member/Applicant declaration and signature

Important note: The Trustee collects the information in this form for the purpose of updating the information it holds about you. The information provided in this form will be used in accordance with the Trustee’s privacy policy available at www.sfg.com.au/portfolio/privacy.

It is your responsibility to inform your beneficiaries that you have provided their personal information to the Trustee and to refer your beneficiaries to the Trustee’s privacy policy.

I understand that:

- the persons nominated must be my Dependants at the date of nomination and at the date of my death
- my Non-Binding Death Benefit Nomination will cancel any other Non-Binding Nomination made by me and will not be in effect until it has been received and accepted by the Trustee
- my Non-Binding Death Benefit Nomination is not binding on the Trustee but will be taken into consideration by the Trustee when it determines to whom to pay my death benefit.

Member/Applicant signature

Signature

Date

 / /

Please forward all correspondence and enquiries to:

Post Shadforth Portfolio Service – Pension
Reply Paid 264 Melbourne VIC 8060

Email portfolioservice@sfg.com.au

Telephone 1800 931 792