

Preferred Beneficiary Nomination



Fire & Emergency Services
Superannuation Fund

Please make sure you send this form to FES Super as soon as it is completed.

Member Number

Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)* Surname

Given Names

Daytime Phone Number

Date of Birth

Home Address

Postcode

Postal Address *(if same as above, write N/A)*

Postcode

Personal Email Address *(we will use this to contact you)*

Your Beneficiaries

Refer to the Important Information section for an explanation of eligible beneficiaries to ensure your nomination is valid. Percentages of benefit for each beneficiary must be a whole number.

Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)*

Date of Birth

Given Names

Surname

Home Address

Spouse Child Interdependent Financial dependent

% of Benefit

Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)*

Date of Birth

Given Names

Surname

Home Address

Spouse Child Interdependent Financial dependent

% of Benefit

Preferred Beneficiary Nomination

...continued



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Superannuation Fund

Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)*

Date of Birth

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Title Mr / Mrs / Miss / Ms / Other *(circle whichever applies)*

Date of Birth

Given Names

Surname

Home Address

Spouse Child Interdependent Financial dependent

% of Benefit

AND/OR I wish to nominate the Executor or Administrator of my estate
(my Legal Personal Representative)

% of Benefit

Total must equal 100% or all of the nominations will be invalid.

TOTAL %

For more information, refer to the Product Disclosure Statement and Reference Material available on our website at www.fessuper.com.au

Signature

Date

FES Super to complete

Entered on Bluedoor

Entered By

Date

Checked by

Date

We are committed to respecting the privacy of personal information you give us. If you would like a copy of FES Super's Privacy policy, visit fessuper.com.au, email admin@fessuper.com.au or call (08) 9382 8444.



Important Information

What is a Preferred Beneficiary Nomination?

In the event of your death, FES Super will need to determine who your super is paid to. A preferred beneficiary nomination provides a guide to the Board in deciding who will receive your death benefit. It is more a guideline for the Board to take into consideration when deciding who to pay your benefit to, but are not obligated to follow if the Board considers there is someone who is a more appropriate recipient.

In the event of your death, if your nomination is found to be invalid, the Board will use its discretion to determine how your benefit will be paid. An invalid nomination may still be an important consideration for the Board when determining the payment of your death benefit.

Who can I nominate as a beneficiary?

You can nominate a dependant or your Legal Personal Representative (that is the executor or administrator of your estate). If you nominate your Legal Personal Representative it is important that you have a valid Will and keep it up-to-date, as the Board must pay your death benefit to your estate. All your beneficiaries must be alive and in an identified category on the day of your death.

Under superannuation law, 'dependants' include:

- Your current spouse (includes married and defacto couples);
- your child (incl. an adopted child, step child or child of your spouse);
- any person in an 'interdependent relationship' with you; or
- any other person who the Board considers was dependent on you for maintenance or support, at the date of your death.

Someone can be in an **interdependent relationship** with you if:

- you have a close personal relationship;
- you live together;
- one or each of you provides the other with financial support; and
- one or each of you provides the other with domestic support and personal care.

Interdependency can also arise where two people have a close personal relationship but don't live together or provide each other with financial support or personal care because of physical, intellectual or psychiatric disability. In most cases, your parents are not considered to be your dependants. If you want your death benefit to go to your parents, you should seek legal advice about arranging for your Will to cater for this.

Any amount paid to your Legal Personal Representative will be distributed according to your Will or, if you do not have a Will, according to the laws of the State in which you resided at the date of your death.

If your nominated beneficiary doesn't fit into any of the identified categories, your nomination may be invalid.

What will FES Super do?

We will confirm any new, amended or cancelled nomination. We will confirm your current preferred beneficiary nomination details each year with your Annual statement.

Will the money be taxed?

Different tax treatments can apply depending on whether your super is paid to your beneficiary or beneficiaries.