

REVERSIONARY BENEFICIARY NOMINATION OR CHANGE FORM

Complete this form to nominate, replace or revoke a reversionary beneficiary on your existing WealthFocus Pension Plan account. This is an optional feature.

You should consider if there are any tax consequences depending on the type of nomination you make and the beneficiaries. We recommend that you consult a financial and/or tax adviser before making any nomination.

Please note: This feature is not available to members with a WealthFocus Term Allocated Pension.

Please complete all pages of this form in black ink using BLOCK letters. Mark boxes with an (X) where applicable.

1. Personal details

Title Mr Mrs Miss Ms other

first name(s)

last name

client number

This nomination applies to Pension Plan account number including any 'Pension Refresh'

2. Nomination – Reversionary Beneficiary Details

Complete this section if you wish to nominate a reversionary beneficiary.

Your nomination in this section will revoke and replace any existing death benefit nomination, including any existing reversionary beneficiary nomination.

Note: You can only have one nomination for your account at any one time. If we also receive a binding death benefit nomination with this reversionary beneficiary form, the reversionary beneficiary nomination will take priority if both nomination forms have the same date. If you make a different death benefit nomination (including reversionary, binding or non-binding nomination) at a later date, then that later nomination will revoke any earlier nomination.

A) Nominated reversionary beneficiary (full name)	B) Relationship to you	C) Date of birth	D) Share of death benefit
<input type="text"/>	<input type="checkbox"/> spouse	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text" value="100%"/>
<input type="text"/>	<input type="checkbox"/> child		
<input type="text"/>	<input type="checkbox"/> interdependant		
<input type="text"/>	<input type="checkbox"/> financial dependant		

3. Revoke (remove) reversionary beneficiary

Complete this section to revoke (remove) a nominated reversionary beneficiary only. You do not need to complete this section if you have nominated a new reversionary beneficiary in section 2.

If you have not made any nomination, the Trustee will use its discretion under the Trust Deed (subject to law) to pay your death benefit.

revoke (remove) existing reversionary beneficiary nomination

4. Declaration

By making the nomination in this form:

- I understand that I must send this form to the Trustee.
- I understand that when this form is accepted by the Trustee it will revoke and replace any existing beneficiary nominations.
- I understand that I can revoke, amend, or make a new beneficiary nomination by completing another form.
- I understand that for this form to be effective the beneficiary nominated by me must be a dependant within the meaning of the Superannuation Industry (Supervision) Act 1993 (**SIS**) and must also be a dependant who is eligible to receive my death benefit as a reversionary pension at the time of my death.
- I have read the current PDS and agree to be bound by the provisions of the trust deed governing the fund (as amended from time to time).

Signature of member (in black ink)

Note: This form cannot be signed under Power of Attorney

<input type="text"/>	<input type="text"/>
full name	declaration date
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Checklist

Please note that this form cannot be accepted if alterations are made. In the event of an error please complete a new form.

To ensure that your nomination is processed correctly, please check you have:

- nominated a SIS dependant (see 'Beneficiary nominations' below)
- completed all necessary personal details
- signed and dated the declaration

IMPORTANT – We require an original form – This form must be mailed to:

Reply Paid 4171
Perpetual WealthFocus Pension Plan
GPO Box 4171, Sydney NSW 2001

Beneficiary nominations

To receive the death benefit payment, your nomination must be one of the following categories at the date of your death:

- your spouse (legal, same sex or opposite sex de facto)
- your child (including an adopted, step or ex-nuptial child or a child of your spouse)
- in an interdependency relationship with you. An interdependency relationship exists between two people if they have a close personal relationship, live together and one or each of them provides the other with financial support, domestic support and personal care. If a close personal relationship exists but the other requirements for interdependency aren't satisfied because of a physical, intellectual or psychiatric disability, then there is also an interdependency relationship
- a person who is wholly or partially financially dependent on you
- your Legal Personal Representative (LPR), being a person who is the executor of your will or an administrator of your estate.

Your privacy

Privacy laws apply to our handling of personal information.

We will collect, use and disclose your personal information in accordance with our privacy policy. You have a right to seek access to information which we hold about you, although there are some exceptions to this.

Our Privacy Policy is publically available at our website or you can obtain a copy free of charge by contacting us.