



# BT Superannuation Investment Fund BT Superannuation Savings Fund Nomination of Beneficiaries

BT Contact Centre ☎ 132 135 (8am–6.30pm Mon-Fri, Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090 is the Trustee of BT Superannuation Investment Fund ABN 39 827 542 991 RSE R1001327. Westpac Administration Securities Limited ABN 77 000 049 472 AFSL 233731 RSE L0001083 is the trustee of BT Superannuation Savings Fund RSE ABN 83 835 373 437 R1003963

**Use this form to nominate a beneficiary to receive your superannuation benefit in the event of your death. If you do not make a valid nomination, your benefit will be paid to your Legal Personal Representative (ie the executor or administrator of your estate).**

**We recommend you seek professional advice before making a nomination.**

## WHO CAN YOU NOMINATE

### WHO CAN RECEIVE YOUR BENEFIT IN THE EVENT OF YOUR DEATH?

Your benefit can be paid to:

- your Estate, or
- nominated beneficiary(ies), or
- a combination of your Estate and your nominated beneficiary(ies).

Any beneficiary you nominate must be either your Legal Personal Representative (ie the executor or administrator of your estate) or dependent at the date of your death.

### WHO QUALIFIES AS A DEPENDANT?

Your dependants are:

- your spouse
- your child
- a person with whom you have an interdependency relationship (see below for definition)
- a person who is financially dependent on you.

### WHAT IS AN INTERDEPENDENCY RELATIONSHIP?

An interdependency relationship 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.

An interdependency relationship may still exist if there is a close personal relationship but the other requirements are not satisfied because of some physical, intellectual or psychiatric disability.

## NOMINATION

### IMPORTANT INFORMATION ABOUT YOUR NOMINATION

- Valid for the entire term you are a member, unless another valid nomination is lodged with the Trustee.
- Requires no witness signatures.

**What you need to do** – Complete the form on page 2, and send or fax the form to BT.

## 1. NOMINATION DETAILS

What would you like to do?

- Make** a new nomination ▶ Complete Sections 1, 2, 3 and 4.  
 **Revoke** a current binding nomination ▶ Complete Sections 1, 2 and 4.

## 2. INVESTOR DETAILS

Investor number

**C**

Date of birth (dd/mm/yyyy)

/   /

Daytime phone number

(  )

Surname

Given name(s)

Gender

Male  Female

Address

State  Postcode

## 3. NOMINATING YOUR BENEFICIARIES

You can nominate up to five beneficiaries, including your Legal Personal Representative. For more information on who you can nominate see page 1. If any beneficiary nominated is no longer your dependant or Legal Personal Representative at the date of death, they will not be entitled to receive a share of your benefit.

Who would you like your benefit to be paid to in the event of your death?

Please use whole figures when specifying the '% of benefit'. Your total nomination must equal 100%.

	Full name of beneficiary	Date of birth	% of benefit	Residential address
1.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> %	<input type="text"/>
2.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> %	<input type="text"/>
3.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> %	<input type="text"/>
4.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> %	<input type="text"/>
And/or Legal Personal Representative (My estate)			<input type="text"/> %	
<b>TOTAL</b>			<b>100 %</b>	<i>Request will be <b>INVALID</b> if benefit allocation does not equal 100%.</i>

## 4. INVESTOR SIGNATURE

Signature of Investor

Date (dd/mm/yy)

/  /

You can submit this form by:

-  mail BT Financial Group  
Reply Paid 2675, Sydney NSW 2001
-  fax (02) 9274 5780



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