

## BINDING DEATH BENEFIT NOMINATION ('BDBN')

*\*Please complete all details in block letters.*

**PLEASE SUPPLY A COPY OF THE FUND'S MOST RECENT DEED WITH THIS ORDER FORM.**

This form is only for self managed superannuation funds ('SMSF'). Please advise if a BDBN is required in respect of a superannuation fund other than an SMSF, as different instructions will be required.

### SECTION A: PERSON ORDERING

**PERSON ORDERING** \_\_\_\_\_ **Signature** \_\_\_\_\_

(documents and invoice will be directed to this person, unless otherwise stated)

Company name (if applicable) \_\_\_\_\_

Street address \_\_\_\_\_

Postal address, if different \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### SECTION B: SUPERANNUATION FUND INFORMATION

Name of superannuation fund \_\_\_\_\_

Date of current trust deed for the fund (dd/mm/yyyy)     /     /

### SECTION C: CURRENT TRUSTEE DETAILS

If the trustee is a Company complete section C(I) only. If the Trustees are individuals complete section C(II) only.

#### SECTION C(I) : TRUSTEE INFORMATION WHERE TRUSTEE IS A COMPANY

Name \_\_\_\_\_ ACN     -     -

Address of Registered Office \_\_\_\_\_

Full names of all directors of trustee company

<b>T1</b>		<b>T2</b>	
<b>T3</b>		<b>T4</b>	

#### SECTION C(II): TRUSTEE INFORMATION WHERE TRUSTEES ARE INDIVIDUALS

If there are **individual** trustees, their full names:

<b>T 1</b>	Full Name	
	Street Address	

<b>T 2</b>	Full Name	
	Street Address	

<b>T 3</b>	Full Name	
	Street Address	

<b>T 4</b>	Full Name	
	Street Address	

**DETAILS OF FUND MEMBERS**

<b>M 1</b>	Full Name	T1? <input type="checkbox"/>
	Street Address	

<b>M 2</b>	Full Name	T2? <input type="checkbox"/>
	Street Address	

<b>M 3</b>	Full Name	T3? <input type="checkbox"/>
	Street Address	

<b>M 4</b>	Full Name	T4? <input type="checkbox"/>
	Street Address	

**SECTION D: DETAILS OF MEMBER MAKING BDBN**

**FULL NAME** \_\_\_\_\_ **Date of Birth** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Other names member is known by (or before marriage/deed poll) \_\_\_\_\_

Home address \_\_\_\_\_

Occupation \_\_\_\_\_

**SECTION E: PERSONS TO BENEFIT UNDER YOUR BDBN**

Your superannuation interest will be distributed to your dependants or legal personal representative (ie, Executor) ('LPR'). If you choose for it to be distributed to a dependant and that dependant predeceases you, you may nominate alternate dependant(s), or you may nominate that it pass to your LPR. If you have nominated alternate dependant(s) and they also predecease you, you may nominate a third level of dependants, or you may nominate that it pass to your LPR.

It is common to name your spouse as the primary beneficiary and your children as alternate beneficiaries should your spouse predecease you. If both your spouse and any of your children predecease you, it is common for that share to be distributed to your LPR (or alternatively, shared amongst the surviving children).

- \* Please complete the following tables as applicable.
- \* Please refer to the notes below before completing this section.

**STEP 1: PRIMARY BENEFICIARIES**

My benefit shall be distributed to:

My LPR (percentage: \_\_\_\_ %):

Full Name of LPR	Street Address	Occupation

**AND/OR** my dependants:

Full Name	Street Address	Date of Birth	Occupation	% Benefit (Total 100%)	Relationship	Form of benefit

**STEP 2: ALTERNATE BENEFICIARIES**

In the event that any dependants named in step 1 above predecease me, their share(s) shall be distributed to:

My LPR (percentage:        %):

Full Name of LPR	Street Address	Occupation

**AND/OR** my dependants:

Full Name	Street Address	Date of Birth	Occupation	% Benefit (Total 100%)	Relationship	Form of benefit

**STEP 3: FURTHER ALTERNATE BENEFICIARIES**

In the event that any alternate dependants named in step 2 above also predecease me, their share(s) shall be distributed to:

My LPR (percentage:        %):

Full Name of LPR	Street Address	Occupation

**AND/OR** my dependants:

Full Name	Street Address	Date of Birth	Occupation	% Benefit (Total 100%)	Relationship	Form of benefit

Notes:

- 1 Only dependants as defined under the *Superannuation Industry (Supervision) Act 1993 (Cth)* ('SISA') and the *Superannuation Industry (Supervision) Regulations 1994 (Cth)* can benefit under a BDBN. A dependant is a spouse, child (including an adult child) or someone who is financially dependent on or who was in an interdependency relationship with the deceased member.
- 2 A 'de facto' is defined in the SISA as a person who lives with another person on a genuine domestic basis as the husband or wife of the person.
- 3 A person is in an 'interdependency relationship' with a member if they live with the member as part of a close personal relationship with the member, and one or each of them provides the other with personal care and financial and domestic support. Alternatively, a person can also be in an interdependency relationship with the member if they are in a close personal relationship with the member, but do not satisfy the other criteria as either one or both of them suffer from a physical, intellectual or psychological disability.
- 4 A death benefit may only be paid to a child of the deceased as a pension where:
  - the child is less than 18 years of age; or
  - the child is 18 or more years of age and:
    - is financially dependent on the member at the time of death and is less than 25 years of age; or
    - is permanently disabled;

provided that the pension is commuted on the earlier of:

