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# BINDING DEATH BENEFIT NOMINATION



## Look after those who matter most

You've invested time and effort to build up your super. So it's important you make sure your money will be distributed the way you want by making a binding death benefit nomination. A valid binding death benefit nomination generally binds (instructs) Hostplus to pay your death benefit to the beneficiaries you've nominated, and in the proportions you've stated, in your binding death benefit nomination form. As long as your binding death benefit nomination is valid, it will give you greater certainty about who gets your super benefit.

## Making a binding death benefit nomination.

Simply complete the attached form and return it to Hostplus. The form provides space for four beneficiaries. If you would like to nominate more beneficiaries, you can write the full details of all additional beneficiaries on a separate piece of paper. Please ensure you sign and date the additional page in the presence of two witnesses in the same manner as required on the form. Your witnesses must sign and date the form at the same time as you.

Send your completed form to:

Hostplus  
Locked Bag 5046  
Parramatta NSW 2124

## Who can you nominate?

You can nominate as many beneficiaries as you like, as long as each person falls into at least one of the following categories:

- **Your spouse** – including de facto, same sex or a spouse from a relationship registered on the applicable Relationships Register under State or Territory law.
- **Your children** – including an adopted child, stepchild, ex-nuptial child, child of your spouse, or eligible child of same sex couples.
- **A dependant**, defined as:
  - A person who is wholly or partially financially dependent on you, or
  - A person in an interdependent relationship with you. This means you share a close personal relationship and live together, and 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.

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**i** An interdependent relationship can also exist if a close personal relationship exists but the other requirements for interdependency are not satisfied because of a physical, intellectual or psychiatric disability.

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- **Your legal personal representative** – who is either the executor named in your will or a person appointed by the court as the administrator of your estate, if you do not have a will. By nominating your 'legal personal representative'; whether or not you have made a will, you can effectively distribute your superannuation benefits to people who are not otherwise considered dependants for the purposes of superannuation.

Payments made to a legal personal representative may incur tax liabilities and expose the payment to insolvency laws. For further details we recommend you obtain advice from a licensed Financial Planner.

## Is your binding death benefit nomination form valid?

A valid and effective binding death benefit nomination is a binding direction from you to the Trustee to pay any death benefit to your estate or to one or more Dependants nominated by you and in the proportions that you have specified. If you make a binding death benefit nomination and it is still valid and in effect at the event of your death, the Trustee will usually be bound to follow it and pay your death benefit to your estate and/or the Dependants you have nominated and in the proportions specified by you.

Your binding death benefit nomination is invalid if:

- it is not made using this *Binding Death Benefit Nomination Form*,
- this *Binding Death Benefit Nomination Form* has not been properly completed (for example, the nominated proportions are not clear or do not equal 100%, or the form has not been signed and witnessed correctly),
- at the time of your death, one or more of the persons nominated by you have died or is not your Dependant or legal personal representative,
- you were legally incapable of making the nomination, or
- the Trustee is legally restrained or prohibited from paying your benefit payout to one or more of the persons nominated by you.

## Keep your binding death benefit nomination up to date.

Your nomination becomes invalid after three years, so you need to update them regularly. It's also important to update your nomination when your circumstances change – for example, if your personal relationship status changes or you have children.

To help you keep track of your nomination, we'll include the expiry date of your nomination on your Hostplus Member statements. You can also check your beneficiaries in your Member Online account at any time.

If your nomination expires and you don't replace it with a new binding nomination, your benefit will be paid at the trustee's discretion.

To update or cancel your binding death benefit nomination just complete and return a new form.

## WE'RE HERE TO HELP.

If you have any questions, we're happy to help. Just call 1300 467 875, 8am – 8pm AEST /AEDT, Monday to Friday or visit [hostplus.com.au](https://hostplus.com.au)

THAT'S  
A PLUS+



This information is general advice only and does not take into account your personal objectives, financial situation or needs. You should consider if this information is appropriate for you in light of your circumstances before acting on it. Please read the relevant Hostplus Product Disclosure Statement (PDS), available at [hostplus.com.au](https://hostplus.com.au) before making a decision about Hostplus. For a description of the target market, please read the Target Market Determination (TMD), available at [hostplus.com.au](https://hostplus.com.au). Issued by Host-Plus Pty Limited ABN 79 008 634 704, AFSL 244392 as trustee for the Hostplus Superannuation Fund (the Fund) ABN 68 657 495 890, MySuper No 68 657 495 890 198. 1180.1 0622 ISS11

# Hostplus binding death benefit nomination form.



Complete this form to make, update or cancel a binding death benefit nomination for your Hostplus superannuation benefit.

1. Provide your personal details
2. Nominate your preferred beneficiaries
3. Ensure total beneficiary percentage equals 100%
4. Sign and date the form in the presence of two witnesses
5. Ensure both witnesses sign and date the form at the same time
6. Post the form to Hostplus, Locked bag 5046, Paramatta NSW 2124



When you have completed this form please send it to: Hostplus, Locked Bag 5046, Parramatta NSW 2124



## Privacy

Hostplus is seeking to collect your personal information in order to carry out your instructions in this form. If you do not provide us with the information requested, we may not be able to carry out instructions or provide the services you require. For further information about how personal information is handled, you can view the Hostplus Privacy Policy at [hostplus.com.au/privacy](http://hostplus.com.au/privacy) or by calling us on 1300 467 875, which also explains how you can access and correct your personal information.

1

## Provide your personal details.

\*Mandatory fields

Hostplus membership number\*

Hostplus Pension membership number

Date of birth\*



If you have more than one Hostplus membership please list both membership numbers to have your nomination applied to both accounts.

Given names\*

Surname\*

Current address\*

Suburb

State

P/C

Home phone

Mobile phone\*

Email address\*

Please tick one box only

Make a new, or update an existing binding death benefit nomination – go to Section 2

Cancel a binding death benefit nomination



A cancelled, invalid or expired form means that Hostplus will decide which of your spouse, children, dependants or estate receives your death benefit, and in what proportions.

2

## Nominate your preferred beneficiaries.



### Binding death nomination

A binding death benefit nomination provides you with greater certainty about who will receive your benefit in the event of your death. In general, a binding nomination legally binds (instructs) the Hostplus trustee to pay your death benefit to the person(s) nominated as your beneficiary(ies).

- Each beneficiary must be one of the following:  
your spouse, child, dependant, or legal personal representative, as stated in the definitions on pages 1 and 2 of the attached brochure.
- Percentages must be in whole numbers.
- Your total percentage of benefit nominations must add up to 100%.

Please nominate beneficiaries on following page

Please nominate who you would prefer your benefits to be paid to in the case of your death.

	Title*	Given name*	Surname*	Gender*	Date of birth*	Relationship to you (please tick one)*				Share*
						Spouse	Child	Dependant	Legal personal representative	
1										%
2										%
3										%
4										%
										1 0 0 %



If you wish to nominate more than four beneficiaries on a separate piece of paper, provide the details above for each additional beneficiary. Then, make sure it is signed, dated and witnessed in the same manner as this form.

### 3 Sign the declaration.

Please read this declaration before you sign and date your form.

- I have read and understood the information in the binding death benefit nomination brochure and relevant Target Determination Document found at [hostplus.com.au](http://hostplus.com.au).
- I understand that various requirements must be met for this form to be valid including:
  - the beneficiary/ies listed in section 2 are my spouse, child, dependant or legal personal representative, as stated in the definitions on pages 1 and 2 of the attached brochure.
  - it is signed by me in the presence of two witnesses who are 18 years of age or older and not listed as beneficiary/ies on this form
  - my two witnesses and I sign and date this form at the same time,
  - my benefit nomination percentages total 100%, and
  - the form must have been received by the Trustee
- I understand that:
  - this binding death benefit nomination is effective for three years from the date on which it is signed
  - my beneficiary/ies and I will be bound by the provisions of the Hostplus Trust Deed

- I can cancel or update a binding death benefit nomination at any time by completing a new binding death benefit nomination form
- this nomination binds the Hostplus trustee to distribute my benefit as specified, unless my binding nomination is invalid or has expired; in which case I understand that Hostplus can use its discretion to identify and pay beneficiaries, and
- Hostplus accepts no responsibility for an incorrect nomination or completion of this form.

#### Privacy declarations

- I have read and understood the Hostplus privacy policy.
- I understand that it is my responsibility to inform my beneficiaries that I have provided their personal information to Hostplus and refer them to the Hostplus privacy policy at [hostplus.com.au/privacy](http://hostplus.com.au/privacy)

#### Signature of applicant\*

Date\*

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#### Personal witness statement (to be completed at same time as applicant)

The member signed and dated this binding death benefit nomination form in my presence. I am over 18 years of age and I am not listed as a beneficiary on this form.

##### Witness 1

Given name\*

Signature of Witness 1\*

##### Witness 2

Given name\*

Signature of Witness 2\*

Surname\*

Date\*

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Surname\*

Date\*

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This form is only valid if all signatures are completed

This information is general advice only and does not take into account your personal objectives, financial situation or needs. You should consider if this information is appropriate for you in light of your circumstances before acting on it. Please read the relevant Hostplus Product Disclosure Statement (PDS), available at [hostplus.com.au](http://hostplus.com.au) before making a decision about Hostplus. For a description of the target market, please read the Target Market Determination (TMD), available at [hostplus.com.au](http://hostplus.com.au). Issued by Host-Plus Pty Limited ABN 79 008 634 704, AFSL 244392 as trustee for the Hostplus Superannuation Fund (the Fund) ABN 68 657 495 890, MySuper No 68 657 495 890 198. 1180.1 0622 ISS11