

n. panos & associates

solicitors

Phone: 02 9687 3755
Fax: 02 9687 3750

Principal: **Nicholas Panos**
Bec, LLB (Hons)
LLM, F.T.I.A.
Acc. Spec. (Tax.)

BINDING DEATH BENEFIT NOMINATION FORM SCHEDULE

INFORMATION REQUIRED:

1. Fund

Name of Fund	
--------------	--

2. Members Details

Full Name	
Date of Birth	
Address	
Relationship	

3. Nominated Beneficiary Details

Full Name	
Date of Birth	
Percentage	
Relationship to Member	
Is the Beneficiary a Dependent or Legal personal Representative?	
If the Beneficiary does not survive the Member, should the Legal personal Representative be nominated as beneficiary?	

4. Form of Benefit:

- Reversionary Pension
Income Stream
Lump Sum

5. Binding/Non-Binding:

- Binding
- Non-Binding

6. Lapsing/Non-Lapsing:

- Indefinitely
- 3 Years from the date it is signed

For a self-managed super fund each trustee (or each director in the case of a corporate trustee) must be a member and each member must be a trustee (or a director in the case of a corporate trustee). No member can be an employee of another member unless the members concerned are relatives. In the case of a single member fund, if the trustee is a company the member must be the sole director or the member is one of only two directors and the member and the other director are related or the member is not an employee of the other director. If the trustees are individuals the member is one of only two trustees and the other trustee is a relative of the member or the member is not an employee of the other trustee. A fund will not be a self-managed super fund if a member is employed by an employer-sponsor of the fund, and another member (who is not a relative) has a specified interest in that employer-sponsor.