

FirstChoice Wholesale Pension Reversionary Beneficiary Form



Use this form to nominate, replace or revoke (remove) a reversionary beneficiary (pension to continue to be paid after your death) on your existing FirstChoice Wholesale Pension account.

Please note: You cannot use this form to add or remove a reversionary beneficiary to a Term Allocated Pension account.

[SAVE FORM](#)
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Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL LETTERS**. Mark appropriate answer boxes with a cross like the following ☒. Start at the left of each answer space and leave a gap between words. Please contact Colonial First State Investor Services on 13 13 36 with any enquiries.

1 INVESTOR DETAILS

Account number

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Surname

2 REVERSIONARY BENEFICIARY DETAILS

Complete this section if you wish to nominate a reversionary beneficiary. This nomination will override any existing death benefit nomination, including any existing reversionary beneficiary nomination. Note: you cannot have a reversionary beneficiary and non-lapsing death benefit nomination at the same time. If we also receive a non-lapsing death benefit nomination with this reversionary beneficiary form, the reversionary beneficiary nomination will take priority if both nomination forms have the same date. Otherwise the request with the later date will prevail.

Reversionary beneficiary details

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Surname

Date of birth

 (dd/mm/yyyy)

Gender

Male ☐ Female ☐

Relationship to investor

Postal address

Unit number Street number PO Box

Street name

Suburb

State Postcode

Country

Email

Work phone number

Home phone number

Fax number

Mobile phone number

3 REVOKE (REMOVE) REVERSIONARY BENEFICIARY

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

☐ Revoke (remove) existing reversionary beneficiary nomination

4 DECLARATION

The *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (Cth) requires us to verify your identity before we can process your instructions. This means your personal information will be provided to an authorised third party to use the Australian Government Document Verification Service that matches government-issued identification documents (e.g., passport, driver's licence, birth certificate, Medicare) with the issuing government agency. This information and the search results are retained by us to comply with our identification and record-keeping requirements. By signing this form, you give your consent for your identity information to be verified electronically through the Australian Government Document Verification Service. Your personal information will be handled in accordance with our privacy policy, which includes our Privacy Collection Notice. Please click 'Privacy' at the bottom of any webpage on the CFS public website. If you have any further questions, please contact us by calling our Service Centre on 13 13 36. You can find more information about the Document Verification Service at www.dvs.gov.au.

I understand/declare that:

- if this nomination is consented to by AIL, any existing death benefit nomination (for example a non-lapsing death benefit nomination) or any existing reversionary death benefit nomination (if applicable) will be revoked and replaced.
- any beneficiary nominated by me must be a dependant within the meaning of the Superannuation Industry (Supervision) Act 1993 (SIS Act) and must also be a dependant who is eligible to receive my death benefit as a reversionary pension. For this purpose, eligible dependants include (a) my spouse, (b) a child under 18, (c) a child aged 18 to less than 25 who is also financially dependent on me, (d) a child aged 18 or over who is permanently disabled at the time of my death, (e) any other person financially dependant on me at the time of my death or (f) a person with whom I am in an interdependency relationship at the time of my death
- at the time of making this nomination, the reversionary beneficiary nominated by me is a relevant dependant within the meaning of the SIS Act
- my attorney can only be nominated as a beneficiary if my Power of Attorney document specifically states that they can be nominated as a beneficiary of my death benefit.
- if my nomination is invalid in whole or in part, or cannot be followed for any reason or because a reversionary beneficiary is no longer a dependant at the date of my death, then my benefit will be paid to my legal personal representative
- my reversionary beneficiary and I will be bound by the provisions of the trust deed relating to reversionary beneficiary nominations
- I may at any time revoke (remove) or replace a reversionary beneficiary nomination in accordance with AIL, as Trustee, or any future Trustee (as it may be at any given time) procedures
- this reversionary beneficiary nomination applies to the account number on this form
- I have read the PDS and agree to be bound by the provisions of the trust deed governing the fund (as amended from time to time)
- I am over the age of 18

I acknowledge that AIL will not be liable to you for any loss you suffer (including consequential loss) caused by the fact that we may delay, block, freeze or refuse to process a transaction or refuse to provide you any (initial or ongoing) services, in circumstances where:

- we have a legal obligation to refuse to provide those services;
- your transaction may cause us or you to breach any Australian laws or the laws of another country.

Original signature of investor

Print name

Date signed

Please send the completed form to:

Colonial First State

Reply Paid 27, Sydney NSW 2001

or via the secure online system (e-Post) via FirstNet Investor and FirstNet Adviser

Important information about reversionary beneficiaries

What is a reversionary beneficiary?

A reversionary beneficiary is the person you nominate to continue to receive your pension upon your death. You can nominate your reversionary beneficiary at the time of commencing your pension or any time after. Alternatively, you can make a non-lapsing death benefit nomination, which is a request by you to the trustee of FirstChoice to pay your death benefit to the person or persons nominated on your non-lapsing death benefit nomination form.

Who can I nominate as a reversionary beneficiary?

You can only nominate someone who is considered to be your dependant under superannuation legislation and is also a dependant who is eligible to receive a death benefit as a reversionary pension.

This includes your spouse, child (see below for restrictions), financial dependant or person with whom you are in an interdependency relationship.

Please note: It is only possible to pay a death benefit in the form of a pension to your child if the child is, at the time of your death:

- under 18, or
- aged 18 to less than 25 and financially dependent on you, or
- disabled.

In addition, where your pension reverts to an eligible child, the child must cash out any remaining pension balance as a tax free lump sum by no later than age 25, unless they remain disabled.