

Reversionary beneficiary nomination

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Use this form to add, change or remove a reversionary beneficiary to/from your retirement income account with CareSuper.

Important information

Adding, changing or removing a reversionary nomination may impact your social security benefits. You must inform Centrelink or the Department of Veteran's Affairs if you add, change or remove a reversionary beneficiary.

You should seek personal advice to confirm if this request will have tax or social security implications.

You can only nominate your spouse as a reversionary beneficiary. If at the time of your death, they're no longer your spouse, the benefit will be paid at the discretion of the trustee.

For more information, read our *Nominating your beneficiaries* fact sheet available at caresuper.com.au/forms-publications or call us.

Section 1

Your details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

Given name(s)

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email

Section 2

Type of nomination

I want to:

Add a new reversionary beneficiary or change my existing reversionary nomination.
This will override any previous beneficiary nomination on this account. Go to section 3.

OR

Remove my existing reversionary beneficiary.
You won't have a nomination on your account until a new nomination is made. Go to section 4.

Section 3

Add or change a reversionary nomination

Spouse details

Last name

Given name(s)

Date of birth (DD MM YYYY)

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email

Section 4

Member declaration

I authorise CareSuper to add, change or remove my reversionary beneficiary nomination as instructed on this form.

By signing this form I acknowledge that:

- to the best of my knowledge, the information I've provided is true and correct
- I understand that adding, changing or removing a reversionary nomination may impact my social security benefits
- the trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made
- I consent to the use of my personal information as outlined in CareSuper's *Privacy policy* available at caresuper.com.au/privacy-policy or by calling us on **1800 005 166**

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form via:

- upload using the Contact Us portal in Member Online
- email to info@caresuper.com.au
- mail to CareSuper, GPO Box 1547, Hobart TAS 7001