

Superannuation change details

- Personal details (complete Sections 1, 2 & 8)
- Insurance cover (complete Sections 1, 3, and/or 4 & 8)
- Nomination of beneficiaries (complete Sections 1, 5 & 8)
- Switch your existing investments and change the investment of future contributions (complete Sections 1, 7 & 8)

Please use **BLOCK letters and black ink** when completing this form.
This form will be invalid if unsigned or undated by the member (see Section 8).

You should obtain and read a copy of the current legalsuper *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document before you complete this form. These documents and all forms that you may require are available free of charge at legalsuper.com.au or by calling **1800 060 312** (8am to 8pm (AEST) Monday to Friday).

Why not make these changes online at legalsuper.com.au?

Return this completed form to:

legalsuper
Locked Bag 5081
Parramatta NSW 2124
Phone: 1800 060 312

1. My details

legalsuper Membership Number

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

2 (a). My new personal details

If you wish to change the **date of birth** or **name** that is recorded in your personal details with legalsuper, you must provide certified original documentary evidence such as a birth, marriage or deed poll certificate.

Only fill in those details which have changed. Leave other parts blank.

Mr Mrs Ms Miss Dr Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

2 (b). New Contact details

You may make this change via MemberAccess.

Residential Address

Town or Suburb

State

Postcode

Postal Address (if different to Residential Address above)

Town or Suburb

State

Postcode

Telephone Number

Mobile Number

Email

2 (c). New Occupation details

Occupation

Judge Barrister Solicitor/Lawyer

Management staff Administration/Support Staff

Other (please specify)

3. Death and TPD insurance cover

legalsuper offers cover for Death, Total and Permanent Disablement (TPD) and Salary Continuance insurance.

What insurance cover do I have?

Subject to meeting the insurer's eligibility conditions, legalsuper members are provided with either Death & TPD cover or Death Only cover at the Default Cover Level. To check your existing cover you can use MemberAccess or contact us on the number shown on this form.

Before you alter any insurance arrangements you should read the *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document available at our website. We recommend that you also obtain financial advice from a suitably qualified professional.

Method of application

You are able to apply for increased Death Only or Death & TPD cover by providing the information required and completing the Personal Health Statement online in MemberAccess. Simply access your legalsuper online account and follow the prompts.

Alternatively, you can complete this form, and download and complete a Personal Health Statement, which you can obtain from legalsuper.com.au

Applications to increase cover are subject to underwriting approval by legalsuper's insurer. Terms and conditions apply as detailed in the *Superannuation Product Disclosure Statement (PDS)* and the *Employer Sponsored Super & Personal Super Additional Information* document.

Your insurance request

Members can apply to increase or decrease or cancel their insurance. Tick your selection and provide your instruction below.

Indicate below the total cover you wish to hold after the change should your application be successful.

Fixed cover

Equal Death & TPD OR Death only TPD only*
 \$ \$ \$

Fixed cover is only available as multiples of \$10,000.

Unitised cover (Employer-sponsored members only)

Equal Death & TPD units OR Death units TPD units*

* TPD cover must be equal to or less than Death cover.

4. Salary Continuance cover

Salary Continuance is available in units of cover of \$100 per month (one unit represents \$100 benefit per month) up to a maximum level of cover of \$30,000 per month. The cost of Salary Continuance insurance varies depending on your age and gender, chosen Waiting Period and Benefit Period, and the amount of your cover.

You can apply for cover up to the lesser of:

- a maximum of 75% of your Salary, plus 10% Superannuation Contribution Benefit paid into your legalsuper account; and
- \$30,000 per month.

A Waiting Period of 30, 60 or 90 days must be chosen.

Method of application

You are able to apply for Salary Continuance by providing the information required and completing the Personal Health Statement online in MemberAccess. Simply access your legalsuper online account and follow the prompts.

Alternatively, you can complete this form, and download and complete a Personal Health Statement, which you can obtain from legalsuper.com.au.

Applications are subject to underwriting approval by legalsuper's insurer. You will be informed of the insurer's decision. Terms and conditions apply as detailed in the *Superannuation Product Disclosure Statement (PDS)* and the *Employer Sponsored Super & Personal Super Additional Information* document

How many units (each unit represents \$100 benefit per month) of Salary Continuance would you like to apply for? (Please tick)

10 units 20 units 30 units 40 units 50 units
 60 units 70 units 80 units 90 units 100 units
 Other (please specify units, up to a maximum of 300 units)

Which Waiting Period do you want to choose?

30 days 60 days 90 days

The Waiting Period is the number of consecutive days that must elapse during which you must be totally or partially disabled before you are eligible to receive Salary Continuance benefits.

Which Benefit Period do you want to choose?

2 years to age 60 to age 65

What is your gross salary inclusive of superannuation?

\$ per annum

Cancel Salary Continuance

Tick this BOX if you wish to cancel your existing Salary Continuance cover. Your cover will be cancelled on the day this form is received by legalsuper.

5. Nomination of beneficiary/ies

You may make a Non-binding nomination via MemberAccess.

All members of legalsuper may make a death benefit nomination. The Trustee will consider the most recent valid nomination that you have with legalsuper.

You may elect to make either a Binding or Non-binding nomination of beneficiary/ies to whom your accrued legalsuper entitlements (including any insurance proceeds) will be paid in the event of your death.

Please note that a death benefit nomination only applies to the particular legalsuper account that you specify that nomination for and the most recent valid nomination will apply only to that particular account.

The most recent valid Non-binding nomination will replace any previous Non-binding nomination for that particular account, whilst the most recent valid Binding nomination will replace any previous Binding or Non-binding nomination for that particular account.

A valid Non-binding nomination of preferred dependants is not binding on the Trustee, but will assist the Trustee in exercising its discretion. The Trustee will determine what proportion of your entitlements goes to one or more of your dependants or your legal personal representative (estate) on your death. Unless the Trustee decides to pay the benefits to your legal personal representative, your entitlements will not form part of your estate and will therefore not be subject to the terms of your Will.

A valid Binding nomination of dependant(s) or legal personal representative (estate) will bind the Trustee to pay your entitlements on your death exactly as you specify. Your nomination will only be valid and binding if it is made in accordance with the relevant requirements. One of these requirements is that you sign the declaration in this Section and have two persons over 18 years of age witness the declaration in your presence.

legalsuper does not accept any Binding nomination made under any form of Power of Attorney.

You are able to nominate both individual beneficiaries and a legal personal representative (estate).

'Dependant' is defined as:

- the spouse of the person, any child of the person and any person with whom the person has an interdependency relationship at the relevant time (being in the case of a deceased person the date of their death); and
- any other person who in the opinion of the Trustee is at the relevant time (being in the case of a deceased person the date of their death) wholly or partially dependent on the person.

Interdependency

Two persons have an interdependency relationship if:

- (a) they have a close personal relationship;
- (b) they live together;
- (c) one or each of them provides the other with financial support; and
- (d) one or each of them provides the other with domestic support and personal care.

Two people have an interdependency if they have a close personal relationship but do not satisfy the other requirements of an interdependency relationship because either or both of them suffer from physical, intellectual or psychiatric disability.

If you wish to make a Binding Nomination, you must submit this form with original signatures.

Please nominate the type of beneficiary option you wish to be implemented in the event of your death. (Please select one option).

OPTION 1 - Lump sum to be paid to your nominated beneficiary/ies (this includes your legal personal representative (estate))

Please provide names of your preferred beneficiary/ies in the event of your death. You can photocopy this page of the form if you have more than four beneficiary nominations. **Benefit allocations can only be up to 2 decimal places and must add up to 100%.**

1. Surname

Given name(s)

Relationship

% of benefit

2. Surname

Given name(s)

Relationship

% of benefit

3. Surname

Given name(s)

Relationship

% of benefit

4. Surname

Given name(s)

Relationship

% of benefit

OPTION 2 - Lump sum to be paid to your legal personal representative (estate)

Do you wish to make a Binding nomination?

No - my nomination is to be Non-binding (**go to Section 8**)

Yes - my nomination is to be Binding (**go to Sections 6 & 8**)

6. Signatures (Binding nomination only)

The following signatures confirm my Binding nomination(s) (my signature plus those of two witnesses over the age of 18 who are not included in the preceding nomination(s) in Section 5) and that I have read and understood the information in this form and the *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document regarding Binding nominations.

I understand that:

- Each beneficiary must be either a dependant as defined in this form or my legal personal representative at the time of my death.
- My beneficiary/ies and I will be bound by the provisions of the legalsuper Trust Deed (as amended) relating to Binding nominations.
- This Binding nomination is only valid for three years from the date I sign it or any confirmation or amendment of it. I accept that should my circumstances change, or those of any of my beneficiary/ies, it is my responsibility to review my nomination and change it if required.
- I may at any time revoke or change a Binding nomination in accordance with legalsuper's procedures.
- If this nomination is invalid or has not been sent to the Trustee when I die, the Death benefit will be paid by the Trustee in its discretion to or for the benefit of one or more of my dependants or my legal personal representative in such proportions between them as the Trustee determines.
- This nomination will replace any previous Binding or Non-binding nomination that I have made with legalsuper only for this particular account I hold with legalsuper.
- I agree and understand my superannuation arrangements will be governed by prevailing legislation and the terms and provisions of legalsuper's governing rules as in force from time to time.
- I have read the above information setting out the terms upon which this nomination is made.
- legalsuper does not accept any Binding nomination made under any form of Power of Attorney.

Member's signature

Date (dd/mm/yyyy)

Two witnesses are required for a Binding nomination

In witnessing this nomination, I declare that the member signed and dated the nomination above in my presence, I am at least 18 years of age and I am not a nominated beneficiary nor the legal personal representative of the member above.

Witness 1

Surname

Given names

Signature

Date (dd/mm/yyyy)

Witness 2

Surname

Given names

Signature

Date (dd/mm/yyyy)

7. Investment options

You can change your investment options via MemberAccess.

You can invest in one option or any mix of options. **The percentage for each option can only be up to 2 decimal places and should add up to 100%.** Please refer to 'Your investment choices' in legalsuper's PDS.

Please leave my existing balance as it is currently invested. Yes No

If "Yes" complete column **2** for Future Contributions only

If "No" complete columns 1 and 2.

Investment Option	1 Please invest my Existing Account Balance as follows:				2 Please invest any Future Contributions as follows:			
	% for each Investment Option				% for each Investment Option			
MySuper balanced ¹ (Employer-sponsored member only)				%				%
Cash				%				%
Enhanced cash				%				%
Conservative				%				%
Conservative balanced				%				%
Balanced index				%				%
Balanced				%				%
Growth				%				%
High growth				%				%
Australian shares				%				%
Overseas shares				%				%
Balanced Socially responsible				%				%
Total	100	0	0	%	100	0	0	%

1. The MySuper balanced option is the default option for Employer-sponsored members only. For Employer-sponsored members, any amount that you have not provided any instruction then that amount will be invested in the default MySuper balanced option.

Applications for the Direct Investment option (DIO) can only be made via MemberAccess at legalsuper.com.au. Investment in the DIO is subject to investment minimums. Please refer to the *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document.

We recommend that you seek appropriately qualified professional advice if you need assistance in making an investment choice.

When an investment switch will occur

In the event that you elect to switch investment choices, your investment switch will occur using the next available unit price.

Requests to switch an investment option(s) received before 4pm (AEST)* on a National Business Day (i.e. a week day that is not a national public holiday or the NSW Queen's Birthday weekend or another day at Trustee discretion) will be made effective on your record two National Business Days later.

* The 4pm (AEST) cut-off applies to requests received via all channels (e.g. online, forms).

The investment switch detail above does not include investments within the DIO, but does apply to transfers to and from the DIO.

The Future Contributions selection in Column 2 above will be applied to any funds transferred from the DIO.

8. Declaration

The personal information that you have provided on this form will be used by legalsuper to change your account in accordance with your instructions. If you do not complete the sections as detailed on page one, the Trustee will not be able to change the details as you have requested.

Information about how legalsuper uses and discloses the personal information that you provide is contained in the Fund's *Privacy Policy*. To access the Fund's Policy and your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday), visit legalsuper's website at legalsuper.com.au or write to legalsuper at Locked Bag 5081, Parramatta NSW 2124.

I acknowledge that:

- (i) I have read the legalsuper *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document.
 - (ii) legalsuper will not implement any request to increase any insurance cover until this is accepted by legalsuper's insurer.
 - (iii) legalsuper will implement any investment change instructions contained in the investment instructions detailed in Section 7.
 - (iv) legalsuper is not responsible for my choice of investment strategy or my individual investment selections, or my decisions as to whether or when to sell my investments.
 - (v) legalsuper is not responsible for any delays in implementing my instructions.
 - (vi) If I have applied for additional or new insurance cover in section 3 or 4, I have attached a Personal Health Statement.
 - (vii) Any Non-binding nomination will replace any previous Non-binding nomination I have made with legalsuper, only for this particular account I hold with legalsuper.
 - (viii) I understand that legalsuper will confirm my instructions in writing.
- I acknowledge that I should seek independent professional financial advice if I need assistance.

Member's signature

Date (dd/mm/yyyy)

Please send the original of this form to:

legalsuper
Locked Bag 5081
Parramatta NSW 2124