Lutheran Super
You're valued

Lutheran Super – Pension Category

Nominating your beneficiaries

Who'll get your super if you die?

You can nominate who you'd like to receive your death benefit should you die while a member of Lutheran Super. Your nominee(s) must be a Dependant* and/or your legal personal representative. **The Trustee of Lutheran Super is not legally bound by your wishes but will take them into account.**

You can update your nomination of beneficiaries any time. This form replaces any previous nomination of beneficiaries. As your personal circumstances change, it's important to remember to keep both your Will and your nomination of beneficiaries up-to-date.

*See Step 2

If you need help

For assistance call the Helpline on 1800 635 796 or refer to www.lutheransuper.com.au

Step 1 – Complete your personal details

Please print in black or blue pen, in uppercase, one character per box. A ✓

Title Mr ◯ Mrs ◯ Ms ◯ Miss ◯ Date of birth / /

Given names

Surname

Postal address

Suburb State

Postcode Telephone - Fax -

E-mail

Membership number

Name of your employer (if applicable)

Continued over

Issued by LCA Nominees ABN 61008204939, AFS Licence No. 240571 RSE Licence No. L0002103 as Trustee for Lutheran Super ABN 93371348387, Registration No. R1005707.

Step 2 – Choose either a Reversionary Pension or Lump Sum payment

You may choose for your Pension Account to be paid to your dependant either as a Lump Sum payment or as a Reversionary Pension.

Lump Sum death benefits can only be paid to:

- your spouse whether by marriage, a de-facto relationship (including same-sex partners) or a registered relationship under a law of State or Territory
- your children including step-children, adopted children and your spouse's children (irrespective of their age),
- your legal personal representative, and
- any person with whom you have an interdependency relationship.

Reversionary pensions can only be paid to:

- a surviving spouse (as defined above); or
- your child being under age 18; or
- your child being under age 25 and financially dependent on the you; or
- your child suffering from a prescribed disability; or
- any person with whom you have an interdependency relationship.

Please note you may only choose one dependant to receive a Reversionary Pension.

For full details on reversionary pensions and lump sum death benefits, please refer to the **Nominating your beneficiaries** section of the PDS.

In the event of my death: **(Select an option)** ✓

○ Please pay my Pension Account paid to the dependant nominated below as a Reversionary Pension:

OR

○ Please pay my Pension Account paid as a Lump Sum to the dependant(s) nominated below*:

Step 3 – Make your nomination

I'd prefer my death benefit to be paid to the following people in the proportion shown below:

Name

Relationship to you* Proportion of payout %

Name

Relationship to you* Proportion of payout %

Name

Relationship to you* Proportion of payout %

Name

Relationship to you* Proportion of payout %

Continued over

Step 3 – Make your nomination (continued)

Name

Relationship to you*

Proportion of payout %

Total 1 0 0 %

*Must be a Dependant or be your legal personal representative (the executor of your Will), if you wish to have your benefit payable to your estate.

'Dependant' is defined as:

- your spouse - whether by marriage, a de facto relationship (including same-sex partners) or a registered relationship under a law of State or Territory (including same-sex partners)
- your children including step-children, adopted children and your spouse's children, and
- any other person who the Trustee considers is wholly or partially dependent on you at the time of death.
- a person with whom you have an interdependency relationship

Your Privacy

LCA Nominees Pty Ltd ABN 61 008 204 939 is the trustee of the regulated superannuation fund known as Lutheran Super ABN 93 371 348 387. Lutheran Super is administered by the trustee with the assistance of a professional administration company engaged by us to perform administration services for the fund. We collect and handle personal information about you in order to manage and administer your superannuation arrangements. We may also use it to supply you with information about products and services offered by us and our related companies that we expect to be of interest to you. If you do not wish to receive marketing material, please contact us on 1800 635 796, or write to our Privacy Officer using the details listed below.

Our Privacy Policy is available to view at www.lutheransuper.com.au or you can obtain a copy by contacting us on 1800 635 796.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, another super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage and administer your super, including your employer, our professional advisors, insurers, other organisations who provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and to our other service providers where it is used to assist with managing and administering your super.

In the process of managing and administering your super arrangements with us, your personal information may be disclosed to service providers who are based outside of Australia. It is anticipated that our current professional administrator may disclose personal information to information technology servers which are based in the United Kingdom, the United States, India, New Zealand or Bermuda. We will use all reasonable efforts (with the assistance of our professional administrator) to ensure that information disclosed via our professional administrator to foreign countries will not be held, inappropriately used or disclosed by the recipient of the information in those countries.

Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1800 635 796 or write to our Privacy Officer; The Privacy Officer, Lutheran Super, 197 Archer Street, North Adelaide, South Australia 5006.

Step 4 – Sign the form

By signing this form I understand that:

- this form is not legally binding on the Trustee in making its decision about my death benefit
- this form will be used by the Trustee to help work out who will receive my death benefit
- the information may be disclosed to the administrator, my employer and other parties as required
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

✗

Date

/ /

Please return your completed form to the Fund Administrator, Lutheran Super, GPO Box 4303, Melbourne, VIC 3001.