

Nominating your preferred beneficiaries in the Mercer Super Trust

Who'll get your super if you die?

You can nominate who you'd like to receive your death payout should you die while a member of the Mercer Super Trust. Your nominee(s) must be a Dependant* and/or your legal personal representative.

The trustee of Mercer Super Trust is not legally bound by your wishes but will take them into account. Alternatively, you can make a nomination for payment of your death payout that you wish to be binding on the trustee, by completing a separate *Making a binding death benefit nomination in the Mercer Super Trust* form available from the website at www.mercersuper.com.au or by calling the Helpine on 1800 682 525.

You can update your nomination of preferred beneficiaries any time. This form replaces any previous nomination of preferred 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 or to access the Privacy Policy and your personal information call the Helpline on **1800 682 525**.



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box. **Please note** the form must be signed with a pen and submitted by post. The form cannot be signed digitally.

Want to make this quicker and easier?

Did you know you can also do this in your Member Online account? It's faster, easier and more secure for you www.mercersuper.com.au Having trouble? Here's some troubleshooting information to help get you logged in www.mercersuper.com.au/member-online-and-mercer-super-app

Step 1 – Complete	your personal details
Title: Mr Mrs Ms	Miss Other Date of birth: ////////////////////////////////////
Given names	
Surname	
Postal address	
Suburb	State
Postcode	Telephone Mobile
Email	
Account/Membership nui	mber
Plan/Product name	
Name of your employer	

Nominating your preferred beneficiaries in the Mercer Super Trust

12/2023

Step 2 – Make your nomination	
I'd prefer my death payout 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 Proportion of payout	
Name	
Relationship to you* Proportion of payout Proportion of payout	
Name	
Relationship to you* Proportion of payout Proportion of payout	
Name	
	
Relationship to you* Proportion of payout Proportion of payout	
Total 1 C	0 0 %
*Must be a Dependant or be your legal personal representative (your executor or administrator).	
'Dependant' is defined as:	
your spouse as defined in the relevant legislation which generally includes	
- your husband or wife	
- another person (whether of the same sex or not) with whom you are in a registered relationship	
- another person who, although not legally married to you, lives with you on a genuine domestic basis in a relationship as	a couple
your children as defined in the relevant legislation which generally includes	
- your adopted child, step-child, or ex-nuptial children - your spouse's child	
- someone who is a child of you within the meaning of the Family Law Act 1975	
any other person who the trustee considers is wholly or partially dependent on you at the time of death, and	
 any person you have an interdependency relationship with. Two people have an interdependency relationship if: 	
1. they have a close personal relationship,	
2. they live together,	
3. one or each of them provides the other with financial support, and	
4. one or each of them provides the other with domestic support and personal care.	

Nominating your preferred beneficiaries in the Mercer Super Trust

An interdependency relationship will also exist between two people if they have a close personal relationship but do not meet the other criteria as listed above (2, 3 & 4) because either or both of them suffer from a physical, intellectual or psychiatric disability.

Your Privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your superannuation. You can read our Privacy Policy online at **mercer.com.au/privacy** or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 3 – Sig	gn the form
this form ithis form v	is form I understand that: is not legally binding on the trustee in making its decision about my death payout will be used by the trustee to help work out who will receive my death payout to my information being collected, disclosed and used in the manner set out in this form.
Signature	Date // // //