

# Reversionary nomination

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281  
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

**Use this form to make a reversionary nomination on your pension account.**

**Important: In requesting a reversionary nomination, you are requesting a full commutation of your existing pension and commencement of a new pension within your account (a Pension Update). As a result:**

- This may affect Centrelink income support recipients and Commonwealth Seniors Health Card holders as any income test grandfathering will be lost where a full commutation of your existing pension and a commencement of a new pension occurs on or after 1 January 2015.
- A **pro rata minimum pension payment** may be made to you before the commutation occurs. This represents the minimum pension payable on the existing income stream for the financial year up to the date of the Pension Update.
- Your Cash Account/Hub will be credited with any accrued interest to date
- After the reversionary nomination is made via the Pension Update, you will be mailed a pack containing a **Pension Review Statement** and **Advice to Centrelink/Veterans Affairs** (detailing your new income stream), and if applicable, a **PAYG Payment summary** (detailing any PAYG tax withheld for the prior income stream)
- Pension details online will be updated to reflect the details of your new income stream (including your new reversionary beneficiary nomination).
- A reversionary nomination can only be revoked if the nominee is no longer eligible to receive a pension in the event of your death (for example, because the nominee has died or because the nominee is no longer your spouse) and applicable supporting documentation is provided (for example, death certificate or evidence of divorce (as applicable)).

## 1. Member details

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### Member name

### Member account(s)

Your nomination will only apply to accounts listed on this form

## 2. Reversionary nomination details

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### Nominee details

Given name(s):

Surname:

Date of birth:

Gender:

Male

Female

### Nominee address

Street number and name:

Suburb:

State:

Postcode:

Country (if outside Australia):

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## 2. Reversionary nomination details (continued)

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Relationship to you	Spouse
	Qualifying child*
	Interdependent person (who is not a child)
	Financially dependant person (who is not a child)

\* A qualifying child is a child who (at the time of the member's death) is:

- less than age 18, or
- aged 18 to 24 inclusive and is financially dependent on the member, or
- aged 18 or more and has a qualifying disability (broadly, this is a disability that is permanent or likely to be permanent and results in the need for ongoing support and a substantially reduced capacity for communication, learning or mobility).

## 3. Member declaration and signature

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- I hereby request the reversionary nomination as listed in section 2.
- I understand that, unless I nominate a reversionary or a non-lapsing death benefit nomination, my death benefits will be paid to my estate.
- I understand that I am authorising the full commutation of my existing income stream and commencement of a new income stream, based on the full balance of my pension account (known as a Pension Update).

 **This form must be signed by the member. Power of Attorneys cannot sign this form.**

Signature:

Name:

Date:




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### Sign

- Wet signature
- Electronic signatures are not accepted on this form.

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### Submit

-  Upload to **Request Centre** (advisers only)
-  Email to **wrapsolutions@macquarie.com**
-  Mail to **GPO Box 4045, Sydney, NSW, 2001**

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### Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online  
If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063