

# ORDERING CHECKLIST

## Standard Binding Death Benefit Nomination – Topdocs SMSF deeds only

Outlined below is a checklist of the information needed to complete a Standard Binding Death Benefit Nomination order.

### FUND DETAILS

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- ☐ Name of the Superannuation Fund

### TRUSTEE DETAILS

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If the Fund has individual trustees:

- ☐ Full name of each individual trustee

If the Fund has a corporate trustee:

- ☐ Name of the company  
☐ ACN of the company  
☐ Full name of each director of the corporate trustee  
☐ Registered address of the company

### MEMBER DETAILS

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- ☐ Full name and address  
☐ Member's date of birth and gender  
☐ Date of previous BDBN (if any)

### PRIMARY BENEFICIARY DETAILS

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- ☐ Full name and address  
☐ Percentage of total benefit the Primary Beneficiary will receive  
☐ Relationship to the Member

### SECONDARY SURVIVING BENEFICIARY DETAILS

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The Member can nominate a Secondary Surviving Beneficiary to receive the Primary Beneficiary's benefit should that Primary Beneficiary predecease the Member

- ☐ Full name and address  
☐ Relationship to the Member  
☐ Percentage of the Primary Beneficiary's benefit attributed to this dependant

Should you have any queries regarding this checklist, please contact the team at Topdocs on 1300 659 242.

# ORDERING CHECKLIST

## Complex Binding Death Benefit Nomination

Outlined below is a checklist of the information needed to complete a Complex Binding Death Benefit Nomination order.

### FUND DETAILS

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- ☐ Name of the Superannuation Fund

### TRUSTEE DETAILS

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If the Fund has individual trustees:

- ☐ Full name of each individual trustee

If the Fund has a corporate trustee:

- ☐ Name of the company  
☐ ACN of the company  
☐ Full name of each director of the corporate trustee

### MEMBER DETAILS

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- ☐ Full name and address  
☐ Member's date of birth and gender  
☐ Date of previous BDBN (if any)

### PRIMARY BENEFICIARY DETAILS – SPECIFIC ASSET ALLOCATIONS

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- ☐ Full name and address  
☐ Specific assets to be attributed to the dependant  
☐ Form of benefit to be paid to the dependant i.e. lump sum  
☐ Relationship to the Member

### PRIMARY BENEFICIARY DETAILS – BALANCE OF ASSET ALLOCATIONS

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- ☐ Full name and address  
☐ Percentage of remaining total benefit attributed to this dependant  
☐ Form of benefit to be paid to the dependant i.e. lump sum  
☐ Relationship to the Member

# ORDERING CHECKLIST

## Complex Binding Death Benefit Nomination

### SECONDARY SURVIVING BENEFICIARY DETAILS – SPECIFIC ASSET ALLOCATIONS

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The Member can nominate a Secondary Surviving Beneficiary to receive the specific asset allocations of the Primary Beneficiary should that Primary Beneficiary predecease the Member

- ☐ Full name and address
- ☐ Relationship to the Member
- ☐ Specific asset to be attributed to the dependant (that was originally attributed to the Primary Beneficiary)

### SECONDARY SURVIVING BENEFICIARY DETAILS – BALANCE OF ASSET ALLOCATIONS

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The Member can nominate a Secondary Surviving Beneficiary to receive the Primary Beneficiary's balance of asset allocations should that Primary Beneficiary predecease the Member

- ☐ Full name and address
- ☐ Relationship to the Member
- ☐ Percentage of the Primary Beneficiary's benefit to be paid to the dependant

### FINAL SURVIVING BENEFICIARY DETAILS – SPECIFIC ASSET ALLOCATIONS

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The Member can nominate a Final Surviving Beneficiary to receive the specific asset allocations of the Secondary Surviving Beneficiary should that Secondary Surviving Beneficiary predecease the Member

- ☐ Full name and address
- ☐ Relationship to the Member
- ☐ Specific Asset to be attributed to the dependant (that was originally attributed to the Secondary Beneficiary)

### FINAL SURVIVING BENEFICIARY DETAILS – BALANCE OF ASSET ALLOCATIONS

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The Member can nominate a Final Surviving Beneficiary to receive the Secondary Surviving Beneficiary's balance of asset allocations should that Secondary Surviving Beneficiary predecease the Member

- ☐ Full name and address
- ☐ Relationship to the Member
- ☐ Percentage of the Secondary Beneficiary's benefit to be paid to the dependant

Should you have any queries regarding this checklist, please contact the team at Topdocs on 1300 659 242.