



# Potential Beneficiary Statutory Declaration

This form must be completed by a dependant, Legal Personal Representative or any other person wishing to be considered.

MLC Nominees Pty Limited ABN 93 002 814 959 The Universal Super Scheme R1056778  
AFSL 230702 RSE L0002998 Superannuation Fund Number 281 440 944

## Name of Deceased

## Member/Policy No.

## 1 Your Details

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Dr ☐ Other ☐

Surname (Family name) (PLEASE PRINT)

Given Name(s) (PLEASE PRINT)

Address

Postcode			

Relationship to Deceased  
(spouse/child/financial dependant/interdependent\*)

Date of Birth

Telephone

Occupation

## 2 Who is a dependant?

A 'dependant' of a member is defined in the governing rules of the fund to include a spouse (including a de facto spouse); any child (regardless of age), including a step, adopted or ex-nuptial child; any other person who comes within the definition of 'dependant' under SIS or any other person the Trustee believes is or was at the date of death wholly or partially dependant on the member.

### Please tick

☐ I am not a dependant of the deceased

☐ I am a dependant of the deceased as defined in the governing rules of the Fund. The Nature of my dependence is as follows:

☐ **Spouse/de facto spouse** (A de facto spouse may be asked to provide further details)

☐ **Financial** – Please provide details of your dependency in section 8

## Question 2 continued...

☐ **Child** (regardless of age) or guardian on behalf of child or children of deceased (under 18) as listed

☐ Adult Child - Please provide details of your financial dependency in Section 8

☐ Minor Child - under age 18 - Parent or legal guardian to complete on behalf of children - list details of child/ren

☐ Interdependency relationship\*

## List dependants of the deceased

Name	Relationship
<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>
<input type="text"/>	<input type="text"/>
Name	Relationship
<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>
<input type="text"/>	<input type="text"/>
Name	Relationship
<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>
<input type="text"/>	<input type="text"/>
Name	Relationship
<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>
<input type="text"/>	<input type="text"/>

## 3 Claims Details

☐ I do not wish to be considered as a Potential Beneficiary –  
**Please complete sections 9 & 10**

☐ I wish to claim  % of the benefit – **Please complete the remaining sections**

☐ I wish to claim  % on behalf of the Estate as Legal Personal Representative – **Please complete sections 9 & 10**

4 I was living with the deceased at the time of death

☐ **Yes** – Please list people living with deceased at the time of death

☐ **No** – if 'No', Please provide details, eg. spouse but separated, fulltime student living away from home & list people living with the deceased at the date of death.

**\*Definition**  
An Interdependency relationship exists where the person had a close personal relationship with the deceased; and lived together; and provided financial; and domestic support and personal care.

5 I was a student at the time of death

No ☐

Yes ☐

Part time ☐

Full time ☐

6 I was employed at the time of death

No ☐

Yes ☐

Part time ☐ Weekly Wage \$

Full time ☐ Weekly Wage \$

7 I was receiving Government Benefit at the time of death

No ☐

Yes ☐

Benefit type

Weekly Wage \$

8 State the nature and duration of your relationship to the deceased and information regarding any dependency *on the deceased* – *supporting documents should be attached to evidence the dependency relationship* eg. Joint bank accounts, shared living expenses, joint liabilities.

I wish to be considered for the following reasons:

**9 I would not object to the proceeds being paid to:**

☐ Legal Personal Representative of the Deceased


☐ Other

Name and address of beneficiary	Relationship	Portion of total benefit
<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	%

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959 (Cwlth), and I believe that the statements in this declaration are true in every particular.

Name of person making the declaration

Signature

 Date     /     /


Declared at (Place Declared)

on (Date Declared)

     /     /

Before me,  
Person before whom the declaration is made

Signature of person before whom the declaration is made

 Date     /     /

Full name and qualification of person before whom the declaration is made (*PLEASE PRINT*)

Address of person before whom the declaration is made

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode					

Note 1: A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years – see section 11 of the Statutory Declarations Act 1959 (Cwlth).

Note 2: Chapter 2 of the Criminal Code applies to all offences against the Statutory Declarations Act 1959 – see section 5A of the Statutory Declarations Act 1959 (Cwlth).

**10** A Statutory Declaration under the Statutory Declarations Act 1959 (Cwlth) may be made before:

- (1) A person who is currently licensed or registered under a law to practice in one of the following occupations: Chiropractor, Dentist, Legal Practitioner, Medical Practitioner, Nurse, Optometrist, Patent Attorney, Pharmacist, Physiotherapist, Psychologist, Trade Marks Attorney, Veterinary Surgeon.
- (2) A person who is enrolled on the roll of the Supreme Court of the State or Territory, Or the High Court of Australia, as a legal Practitioner (However described); or A Person on the following list:
  - Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
  - Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
  - Bailiff
  - Bank officer with 5 or more continuous years of service
  - Building society officer with 5 or more years of continuous service
  - Chief executive officer of a Commonwealth court
  - Clerk of a court
  - Commissioner for Affidavits
  - Commissioner for Declarations
  - Credit union officer with 5 or more years of continuous service
  - Employee of the Australian Trade Commission who is:
    - (a) in a country or place outside Australia; and
    - (b) authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
    - (c) exercising his or her function in that place
  - Employee of the Commonwealth who is:
    - (a) in a country or place outside Australia; and
    - (b) authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
    - (c) exercising his or her function in that place
  - Fellow of the National Tax Accountants' Association
  - Finance company officer with 5 or more years of continuous service
  - Holder of a statutory office not specified in another item in this Part
  - Judge of a court
  - Justice of the Peace
  - Magistrate
  - Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
  - Master of a court
  - Member of Chartered Secretaries Australia
  - Member of Engineers Australia, other than at the grade of student
  - Member of the Association of Taxation and Management Accountants
  - Member of the Australian Defence Force who is:
    - (a) an officer; or
    - (b) a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 5 or more years of continuous service; or
    - (c) a warrant officer within the meaning of that Act
  - Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
  - Member of:
    - (a) the Parliament of the Commonwealth; or
    - (b) the Parliament of a State; or
    - (c) a Territory legislature; or
    - (d) a local government authority of a State or Territory
  - Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
  - Notary public
  - Permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public
  - Permanent employee of:
    - (a) the Commonwealth or a Commonwealth authority; or
    - (b) a State or Territory or a State or Territory authority; or
    - (c) a local government authority; with 5 or more years of continuous service who is not specified in another item in this Part
  - Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
  - Police officer
  - Registrar, or Deputy Registrar, of a court
  - Senior Executive Service employee of:
    - (a) the Commonwealth or a Commonwealth authority; or
    - (b) a State or Territory or a State or Territory authority
  - Sheriff
  - Sheriff's officer
  - Teacher employed on a full-time basis at a school or tertiary education institution
  - Member of the Australasian Institute of Mining and Metallurgy

