

Death Benefit Nomination for SMSF Information Checklist

- If any member will want **binding** death benefit nominations, then you need to check whether the SMSF's current deed allows for them.
If it doesn't, then you can update to a Cleardocs Deed for \$99. The Cleardocs deed allows for binding death benefit nominations.
- The name of the SMSF
- Contact details for each member of the SMSF
- For each member who wishes to update their Death Benefit Nomination, you need to give the following information about each of their beneficiaries:
 - name
 - relationship to member
 - percentage of the benefit they will receive.
- Decide whether, for each member, the Nominations are to bind the Trustee or not



To create or renew Death Benefit Nominations for a Self Managed Superannuation Fund, you need to provide the information to the left. You might like to print this checklist out and gather the information before you start online.

Client Notes