Cleardocs
clarity | simplicity | ease of use

Information Checklist

To create a Death Benefit Nomination document package, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

Death Benefit Nomination

Fund details

- [ ] Name of the fund.
- [ ] Whether the SMSF trustee is a corporation.

Notes

Nomination details

- [ ] Number of members, the Death Benefit Nomination is being arranged for.
- [ ] For each member, provide the following information:
  - full name.
  - date and place of birth.
  - occupation.
  - address.
  - decide whether the member will appoint a legal representative, other person(s) or both as beneficiary.
- [ ] For each individual person as beneficiary, provide the following information
  - full name.
  - relationship to the member.
  - proportion of benefit, the beneficiary is to receive.
  - in the case of the beneficiary(ies) dying before the member, confirm how the member wants the death benefit distributed.
- [ ] Whether the member's death benefit nominations are to bind the trustee. If yes:
  - confirm if current deed is a Cleardocs one.

Notes