**BDBN Order Form**

**Person ordering**

|  |  |
| --- | --- |
| Name:       |  |
| Firm Name:       | Member number:       |
| Phone:       | Email:       |

 **Payment options**

|  |
| --- |
| [ ]  BDBN Nomination **$275 per member** |

All prices include GST.

To pay on account you must be approved by us to hold a credit account.

If you haven’t set up an account, simply settle your payment using BPAY or through your online account. Once your order is processed, we'll send you an invoice, and as soon as payment is received, all documentation will be delivered to your nominated email address in PDF format.

**Current Fund Details**

|  |  |
| --- | --- |
| Fund Name:       |  |

|  |  |  |  |
| --- | --- | --- | --- |
| SMSF Trustee Name:       |  |  |  |
| Trustee ACN (if a company):       |  |  |  |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary | [ ]  Member |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary | [ ]  Member |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary | [ ]  Member |
| Trustee/Officer name and Role:        | [ ]  Director | [ ]  Secretary | [ ]  Member |

**Please complete all details in legible handwriting and provide full legal names.**

**Please return the completed form to** **info@docscentre.com.au**

**BDBN Order Form**

**BDBN Nomination**

|  |  |
| --- | --- |
| Member Name:       |  |

For the member noted above, nominate who and what amount or percentage each beneficiary will receive. Only the following person/s may be nominated:

* A spouse
* A child
* A person who is financially dependent on the member
* Or a person with whom an interdependency relationship with the member,
* Or their legal personal representative

**Primary Beneficiary Nomination:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Beneficiary Number | Given Name(s)\* | Surname | Relationship | Specify $ or % or Amount |
| 1 |       |       |       |       |
| 2 |       |       |       |       |
| 3 |       |       |       |       |
| 4 |       |       |       |       |

\*if you wish to nominate the members legal representative (the deceased estate) to receive some or all of the members interest, write either ‘Legal Personal Representative’ or ‘LPR” in this column.

If any person nominated as a Primary Beneficiary should predecease the member, the Trustees of the Fund are to do the following:

|  |
| --- |
| [ ]  Distribute the interest nominated to the deceased beneficiary to the members Legal Personal Representative (LPR) |
| [ ]  Distribute the interest nominated to the deceased beneficiary to the remaining Primary Beneficiaries |
| [ ]  Distribute the interest nominated to the deceased beneficiary to Secondary Nominated Beneficiaries as indicated below. |

Only complete this section if alternative beneficiaries are to be nominated.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Beneficiary # or name in table above | Given Name(s) of alternate Beneficiary | Surname of alternate Beneficiary | Relationship | Specify $ or % or Amount |
| 1 |       |       |       |       |
| 2 |       |       |       |       |
| 3 |       |       |       |       |
| 4 |       |       |       |       |

\*if you wish to nominate your legal personal representative (your estate) to receive some or all of the members interest, write either ‘Legal Personal Representative’ or ‘LPR” in this column.



**BDBN Order Form**

**BDBN Nomination**

|  |  |
| --- | --- |
| Member Name:       |  |

For the member noted above, nominate who and what amount or percentage each beneficiary will receive. Only the following person/s may be nominated:

* A spouse
* A child
* A person who is financially dependent on the member
* Or a person with whom an interdependency relationship with the member,
* Or their legal personal representative

**Primary Beneficiary Nomination:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Beneficiary Number | Given Name(s)\* | Surname | Relationship | Specify $ or % or Amount |
| 1 |       |       |       |       |
| 2 |       |       |       |       |
| 3 |       |       |       |       |
| 4 |       |       |       |       |

\*if you wish to nominate the members legal representative (the deceased estate) to receive some or all of the members interest, write either ‘Legal Personal Representative’ or ‘LPR” in this column.

If any person nominated as a Primary Beneficiary should predecease the member, the Trustees of the Fund are to do the following:

|  |
| --- |
| [ ]  Distribute the interest nominated to the deceased beneficiary to the members Legal Personal Representative (LPR) |
| [ ]  Distribute the interest nominated to the deceased beneficiary to the remaining Primary Beneficiaries |
| [ ]  Distribute the interest nominated to the deceased beneficiary to Secondary Nominated Beneficiaries as indicated below. |

Only complete this section if alternative beneficiaries are to be nominated.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Beneficiary # or name in table above | Given Name(s) of alternate Beneficiary | Surname of alternate Beneficiary | Relationship | Specify $ or % or Amount |
| 1 |       |       |       |       |
| 2 |       |       |       |       |
| 3 |       |       |       |       |
| 4 |       |       |       |       |

\*if you wish to nominate your legal personal representative (your estate) to receive some or all of the members interest, write either ‘Legal Personal Representative’ or ‘LPR” in this column.



**Our Partners and Brands**

Important notice:

The person making the nomination should seek legal advice if their personal or financial circumstances change or if they wish to amend or revoke an existing binding death benefit nomination. The member and their advisor should regularly review the binding death benefit nomination to ensure it still matches the members circumstances

By completing this order form and returning to Docscentre you confirm that you have read and accepted our terms and conditions which can be found here – [www.docscentre.com.au/terms-and-conditions/](http://www.docscentre.com.au/terms-and-conditions/)

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| --- |
| A picture containing icon  Description automatically generated Legal documents you can trust. Since 2004 |
| A picture containing application  Description automatically generated  Because it’s a jungle out there. Since 1983 |
| Logo  Description automatically generated The Voice of the Tax Agent community. Since 1992 |
| A logo with a castle in the middle  Description automatically generated  Partnering with you to get it right. Since 1995 |

