Completion of this Free Review will assist in confirming the next step in relation to any BDBN.  The best placed team member at View Legal will be in contact via email with the next step for you and your customer to implement the appropriate solution based on information provided.

View Community members have unlimited access to decision matrices and other toolkits to assist with determining the most likely pathway for each customer’s unique situation, while ensuring value is appropriately positioned for your business.  Log in to your dashboard [here](https://comviewnities.com/adviewser/) to access your resources. Many advisers keep each matrix printed up for easy referencing while assisting customers.

**Please note this form is to be used as a checklist and is for collection of data only. To submit a Free Review, please input the required data via the link** [**here**](https://viewlegal.com.au/bdbn-free-review/)**.**

|  |
| --- |
| **Contact details**Items showing \* are required fields |
| **Firm name\*** |  |
|  |  |
| **Adviser contact name\*** |  |
|  |  |
| First | Last |
| **Adviser email\*** |  |
|  |  |
| **Adviser phone\*** |  |
|  |
| **Are you an accredited adviser with View Legal?\*** |
| [ ]  Yes[ ]  No |
| **Customer details** |
| **Name of customer 1\*** |  |
|  |  |
| First | Last |
| **Does customer 1 have a spouse (married, civil partnership or de facto)?\*** |
| [ ]  Yes[ ]  No |  |
| **If YES, name of customer 2 (i.e. spouse)\*** |  |
|  |  |
| First | Last |
| **Background information** |  |
| **Please provide the current trust deed of the superannuation fund (and any related documents such each deed of variation and the initial establishment deed and any changes of trustee)\*** |
|  |
| **Is the current trustee a company?\*** |
| [ ]  Yes[ ]  No |  |
| **If YES,** **please provide a current ASIC extract\***  |
| **Will the BDBN be non-lapsing? This will depend on the terms of the trust deed\*** |
| [ ]  Yes |  |
| [ ]  No[ ]  Unknown |  |
| **Has the member made a valid reversionary pension?\*** |  |
| [ ]  Yes[ ]  No |  |
|  |  |
| **Do any pensions take priority over a BDBN? This will depend on the terms of the trust deed\*** |
| [ ]  Yes |  |
| [ ]  No[ ]  Unknown |  |
| **Full name of the member making the BDBN\*** |
|  |  |
| **Who is the intended beneficiary of the member’s death benefits?\*** |
| [ ]  100% to the legal personal representative for distribution under the member’s will[ ]  100% to the legal personal representative for distribution under the member’s will, but only if the member’s spouse has failed to survive the member. (For clarity, the member makes no binding nomination if the spouse has survived the member)[ ]  100% to the member’s spouse[ ]  Other – please provide full name of the nominated beneficiaries, their relationship to the member and the percentage of death benefits to be allocated to each |
|  |
| NOTE: Unless the intended beneficiary is the legal personal representative the nominated recipient must be a ‘dependant’ as defined under superannuation law.**If the first nominated recipient is unable to receive the payment, who will be the substituted recipient?\*** |
|  |
| **How should entitlements be paid (i.e. discretion of the trustee or as a lump sum or pension)?\*** |
|  |
|  |

**Is any advice required from View Legal in relation to issues such as (please select all that apply):\***

[ ]  Tax advice

[ ]  Risk of challenge

[ ]  Need for a BDBN (for example, would a non-BDBN be more appropriate)

[ ]  Second order consequences under estate plan

[ ]  Specific specialist strategies (for example child allocated pensions, specific asset BDBNs, SMSF wills, lapsing BDBN, fast death tax – see [here](https://viewlegal.com.au/wp-content/uploads/2019/08/Flyer-Superannuation-and-the-fast-death-tax.pdf))

[ ]  other (please confirm)