



ASDM_P1
11/15

Spouse of a deceased member (contributing or preserved)

Benefit application form – Part 1 (establishing eligibility)

Important information about this form

What this form is for

You can use this form if you are a spouse or partner of someone who passed away as a member of CSS or PSS. If you are a spouse or partner of a deceased member, you may be eligible to receive a superannuation benefit.

Who is eligible?

For information regarding eligibility, please refer to the **Death benefits** factsheet.

How to use this form

- > Please use a black or blue pen.
- > Mark boxes like this with a ✓ or ✗ then fill out the next question or section.
- > Where you see a box like this Go to 3 – skip to the question number shown. You do not need to answer the questions in-between.
- > Where you see a box like this Attach A – attach the requested documents.

Submitting your form

Please post your completed, signed application form and attached documents to:

CSS/PSS
GPO Box 2252
Canberra ACT 2601
AUSTRALIA

Your Government Super at Work

Any financial product advice in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation or needs. You may wish to consult a licensed financial advisor. You should also obtain a copy of the relevant **Product Disclosure Statement (PDS)** and consider its contents before making any decision regarding your super.

Commonwealth Superannuation Corporation (CSC) ABN: 48 882 817 243 AFSL: 238069 RSEL: L0001397
Trustee of the Commonwealth Superannuation Scheme (CSS) ABN: 19 415 776 361 RSE: R1004649
and Public Sector Superannuation Scheme (PSS) ABN: 74 172 177 893 RSE: R1004595

Explanatory notes

These **Explanatory notes** are intended to assist you to complete the attached benefit application form. Before completing this benefit application form, you are advised to read the **Product Disclosure Statement (PDS)** at css.gov.au or pss.gov.au

It is suggested that you separate the notes from the form so that you can refer to them as you complete the application form. We can provide details of your benefit entitlement and explain benefit options. For more information:

CSS

Phone: 1300 000 277
Fax: 02 6272 9612
Email: members@css.gov.au

PSS

Phone: 1300 000 377
Fax: 02 6272 9613
Email: members@pss.gov.au

Section A – About the deceased

Please complete all the boxes in this section.
Please also attach a copy of the full death certificate.

Section B – Your details

Please complete all the boxes in this section.
It allows us to identify you, and tells us how we can contact you.

Contact details

The postal address you provide is where all correspondence will be sent. Contact phone numbers are also required, in case we need to contact you regarding the payment of your benefit.

If you have email access, inclusion of your current email address will be helpful.

Section C – Relationship details

Complete all the boxes in this section and provide any necessary certificates or Statutory Declarations as required.

Section D – Third party authority

If you wish for another party to represent you in this matter please complete and return the authority form.

Section E – Identification requirements

To protect against fraud, safeguard your benefit and comply with the Government's Anti-Money Laundering and Counter Terrorism Financing Legislation, you need to provide documentation to prove your identity.

You can do this via a 100 point identification check at **Section F**. Refer to **Verify my identity electronically** and **Verify my identity using certified documents** for more information.

Section F – Application checklist

Please ensure relevant documents are included.

Section G – Declaration

You must sign the declaration in all cases.
Note: There are penalties for making false declarations in respect of claims for benefits.

Section H, I, J – Departmental report, checklist and certification

To be completed by the deceased member's payroll area only if the member was contributing to CSS/PSS at the date of death.

SECTION A About the deceased member

1. Details

Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

Date of birth / /

Date of death / /

2. Scheme details

Some members have more than one scheme or several memberships.

Please provide AGS numbers for each membership:

Reference number (AGS) scheme

Reference number (AGS) scheme

Reference number (AGS) scheme

SECTION B About you

3. Details

Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

Date of birth / /

Address

RESIDENTIAL ADDRESS

SUBURB STATE POSTCODE

POSTAL ADDRESS

SUBURB STATE POSTCODE

Section B continued on next page

Evidence

Part A

Please provide:

- > a copy of the marriage or relationship certificate
- or**
- > declarations from individuals to affirm the existence of a couple relationship
- > utility and rates bills that support you lived with the deceased for the three year period continuously
- > advice if you jointly owned the property or provide a copy of the rental agreement/lease.

Part B

Please provide:

- > a statement, setting out the circumstances of the relationship
- > a copy of the marriage certificate or relationship
- or**
- > two statutory declarations from individuals to affirm the existence of a couple relationship (at least one by a professional, who is not a family member, eg accountant, lawyer, doctor)
- > utility and rates bills that support you lived with the deceased for the period continuously
- > advice if you jointly own real estate or other assets
- > a statement regarding financial interdependence, including bank statements
- > if applicable, please set out the circumstances regarding the care of any children.

Part C

Please provide:

- > the reason for the absence and evidence to substantiate the separation (eg a letter from the nursing home or medical facility)
- and**
- > before the separation, if you were living with one another for a continuous period of more than three years, please provide the information requested at **Part A**
- > before the separation, if you were living with one another for a continuous period of less than three years, please provide the information requested at **Part B**.

Part D

Please provide:

- > a copy of your marriage certificate
- > a statutory declaration setting out the circumstances of the relationship
- > evidence of whole or substantial dependence on the deceased, including a financial statement, setting out the sources of income and relevant expenditure
- > an overview of how you were essentially dependant upon the deceased.

Part E

Please provide:

- > a copy of the child's birth certificate
- and**
- > if aged between 16 and 25:
 - > evidence of full-time study
 - and**
 - > declaration that the child was not ordinarily employed.

SECTION D Authority for someone to act on your behalf

10. Have you given authority for someone to act on your behalf?

Yes Attach a copy of the relevant document and provide their details below

No Go to 12

I authorise Commonwealth Superannuation Corporation (CSC) to release information about my super entitlements to:

Representative Personal representative Financial representative

Relationship Financial Advisor Solicitor Accountant/tax adviser

Power of Attorney Guardianship Public Trustee

Note: Powers of attorney, Guardianship orders or Public Trustee requests must accompany this authority form in order for information to be released.

Other (please specify)

For the purposes of Acting on my behalf

Name

GIVEN NAME(S)

SURNAME

Date of birth

/ /

Organisation
(if applicable)

You authorise access to
your account details to

any representative of the organisation

or

only the named individual

Postal address

SUBURB

STATE

POSTCODE

Phone

HOME PHONE

MOBILE NUMBER

Email address

@

Financial Services
Licence Number
(Financial representative)

ABN

Allow access from

/ /

to

/ /

(only specify an end date if applicable)

SECTION E Identification requirements

To protect your benefit against fraud, money laundering and terrorism financing, under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* you must prove your identity. To do this you can either:

Choose to have documents verified electronically by completing the section **Verify my identity electronically**.

or

Provide certified hard copy documents by completing the section **Verify my identity using certified documents**.

An electronic copy of documents will be stored in a secure environment and hard copies will be securely stored off-site. All copies will only be used for the purposes of confirming your identity.

Verify my identity electronically

Your documents will be verified electronically using Document Verification Service (DVS), a national online system that allows approved government agencies and organisations to compare a member's identifying information with a government record. It is not a database and does not store any personal information. Requests to verify a document are encrypted and sent via a secure communications pathway to the document issuing authority for checking.

I agree to the use of DVS to verify my documents

Note that if you do not agree to the use of DVS, you will need to provide certified hard copy documents and complete the section 'Verify my identity using certified documents.'

You need to provide the requested details of documents (exactly as they appear on the documents) which **total at least 100 points**. For example your birth certificate and driver's licence total 110 points.

70 points

You can only provide the details of **one** document valued at 70 points.

Australian Birth Certificate

Family name	<input type="text"/>																				
Given name(s)	<input type="text"/> <input type="text"/>																				
Date of birth	<table><tr><td>D</td><td>D</td><td></td><td>M</td><td>M</td><td></td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td>/</td><td><input type="text"/></td><td><input type="text"/></td><td>/</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	D	D		M	M		Y	Y	Y	Y	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Registration No	<input type="text"/>																				
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Certificate No	<input type="text"/>																				

Section E continued on next page

or

Australian Citizenship Certificate

Family name

Given name(s)

Date of birth / /

Stock No

Acquisition date / /

or

Current Australian Passport

Family name

Given name(s)

Date of birth / /

Document No

Gender Male Female

40 points

Australian Driver's Licence or another licence or permit issued under a law of the Commonwealth, a state or territory

Family name

Given name

Middle name

Date of birth / /

Licence No

State of issue STATE

Section E continued on next page

25 points

You can provide the details of **more than one** document valued at 25 points and points will accumulate.

Marriage Certificate or Change of Name Certificate

Type of Certificate Marriage Change of name

Family name (new)

Given name(s) (new)

Family name (old)

Given name(s) (old)

Date of event
(Date of Birth or Date of Marriage) ^D ^D / ^M ^M / ^Y ^Y ^Y ^Y

Registration No

Spouse's Family name

Spouse's Given name(s)

Registration State STATE

Registration date ^D ^D / ^M ^M / ^Y ^Y ^Y ^Y

Registration year

Date printed ^D ^D / ^M ^M / ^Y ^Y ^Y ^Y

Certificate No

Medicare Card

Card No

Reference No

Family name

Given name(s)

Card colour Green Blue Yellow

Expiry date ^D ^D / ^M ^M / ^Y ^Y ^Y ^Y

Section E continued on next page

Verify my identity using certified documents

I wish to verify my identity using certified documents

Note that if you have completed the section 'Verify my identity electronically', you do not need to complete this section and can go to Section F.

You need to provide clear and legible, validly certified documents, as outlined below, which **total at least 100 points**.

70 points (you can only provide one certified document valued at 70 points)

- > Australian birth certificate
- > Australian citizenship certificate
- > Current Australian passport
- > Birth card issued by the NSW Registry of Births, Deaths and Marriages
- > Another document of identity having the same characteristics as a passport (eg diplomatic documents or some documents issued to refugees)

40 points

- > Australian driver's licence or another licence or permit issued under a law of the Commonwealth, a state or territory
- > Student ID card issued by a tertiary education institution
- > Identification card issued by the Commonwealth, a state or territory as evidence of your entitlement to a financial benefit
- > ADF ID card/pass
- > Identification card issued to a public employee

You can provide more than one of these documents, but only one will be valued at 40 points. Additional documents will only be valued at 25 points each.

25 points

- > Marriage certificate (for maiden name)
- > Medicare card
- > Change of name certificate
- > Credit card (one per financial institution)
- > Rates notice
- > Telephone account
- > Foreign driver's licence

You can provide more than one of these documents and points will accumulate. If you are providing copies of bills or statements you should black out any personal financial information or details of transactions in order to protect your privacy.

Examples

Your birth certificate + driver's licence = 110 points ✓

Your current passport + Medicare card + marriage certificate = 120 points ✓

Your birth certificate + Medicare card = 95 points ✗

Section E continued on next page

Certifying your documents

The following sample of certifying authorities can certify your documents:

- > Justice of the Peace (JP)
- > Pharmacist
- > Police officer
- > Medical practitioner
- > Legal practitioner enrolled on the roll of a supreme court or the High Court of Australia
- > Bank officer with two or more continuous years of service
- > Permanent employee of Australia Post with two or more years of continuous service
- > Member of the Australian Defence Force who is:
 - > an officer or a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with two or more years of continuous service
 - or
 - > a warrant officer within the meaning of that Act.

For a full list of certifying authorities refer to the *Statutory Declarations Regulations 1993* available at comlaw.gov.au

The certifying authority must confirm in writing that you are the valid holder of the identification that you are presenting and that any copies are true copies of the original. The certification must include the name, address, occupation, telephone number, registration number of the certifying authority (if applicable) and the date of the certification.

If you live overseas and need to have documents certified or make a Statutory Declaration, it needs to be done by a person who is on a list of persons before whom a Statutory Declaration may be made and who has a connection to Australia. For example a doctor who is registered in Australia and working overseas or an Australian Consular Officer. Refer to ag.gov.au and dfat.gov.au for more information.

SECTION F Application checklist

11. I have attached the following documents

- Certified Identification Documents (see Section E for requirements)
- Certified copy of the Death Certificate (if available)
If you have not yet received the Death Certificate, send us your application form with the other requested documents as soon as possible and send us a copy of the certified Death Certificate as soon as you receive it. This will allow us to start processing your request.
- If you have given authority for someone to act on your behalf, a certified copy of that document.

12. I have also attached the following as requested

- Evidence requested at page 5.

