



## 2. The deceased member's family details (continued)

### Relationship 3

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

**!** Is there any person(s) (other than those listed in Section 2) who was financially dependent or was in an interdependency relationship with the deceased at the date of death? Please note you may need to enter your details in more than one section of the form depending on your relationship with the deceased. See the **Notes for completing the payment of a death benefit form** for definitions of the terms used.

## 3. The deceased member's other financial dependants or interdependencies

### Relationship 1

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

### Relationship 2

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

### Relationship 3

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

**!** Is there any other person (other than those listed in Section 2 or Section 3) who lived with the deceased at the date of death?  
 Please note you may need to enter your details in more than one section of the form depending on your relationship with the deceased.  
 See the **Notes for completing the payment of a death benefit form** for definitions of the terms used.

## 4. Other people who lived with the deceased

### Relationship 1

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

### Relationship 2

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

### Relationship 3

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

### Relationship 4

Name

Address

Suburb  State  Postcode

Were they financially dependent on the deceased?  Yes  No      Age       Phone

Relationship to deceased  
 Spouse/de facto     Child (incl. adult or adopted child)     Financial dependant     Interdependency relationship     Legal personal representative

**!** For details of document certification, see the **Notes**.

## 5. The deceased person's Will

Is there a **Will**?  Yes  No If yes, please forward a certified copy of the Will with this application.

Has a **Grant of Probate** or **Letters of Administration** been applied for or granted?

Grant of Probate  Yes  No      Letters of Administration  Yes  No

If **yes**, please provide details of the Executor(s) receiving these document(s) on the next page and forward a certified copy of the document(s).

If you are providing one of these documents, please indicate **X** whether the estate is

solvent OR  insolvent

**Executor 1**

Name

Address

Suburb

State

Postcode

Were they financially dependent on the deceased?

Yes  No

Age

Phone

Relationship to deceased

Spouse/ de facto       Child (incl. adult or adopted child)       Financial dependant       Interdependency relationship       Legal personal representative

**Executor 2**

Name

Address

Suburb

State

Postcode

Were they financially dependent on the deceased?

Yes  No

Age

Phone

Relationship to deceased

Spouse/ de facto       Child (incl. adult or adopted child)       Financial dependant       Interdependency relationship       Legal personal representative

**Executor 3**

Name

Address

Suburb

State

Postcode

Were they financially dependent on the deceased?

Yes  No

Age

Phone

Relationship to deceased

Spouse/ de facto       Child (incl. adult or adopted child)       Financial dependant       Interdependency relationship       Legal personal representative



Complete this section of the form if you wish to be considered in the payment of a death benefit. If there is more than one person wishing to claim, please take a copy of this section. Each claimant needs to complete a separate form. If this form is being completed on behalf of a minor, it must be signed on their behalf by their legal guardian.

## 6. Request to be considered in the payment of a death benefit

Title     M  F  Date of birth (DD-MM-YYYY)

Last name

Given name(s)

Address

Suburb  State  Postcode

Daytime contact number  Mobile

Tax file number

Your relationship to the deceased

In order to prove the bona fides of a de facto relationship with the deceased, a claimant should attach two statutory declarations completed by two family members or family friends verifying the nature and duration of the relationship and stating how the relationship meets the criteria defined in **Notes**.

**You are not required to complete this section if you were the spouse/de facto or legal guardian of the minor child/children at the deceased's date of death.**

1. Were you financially dependent on the deceased at the time of his/her death? Yes  No
2. Were you in an interdependency relationship with the deceased at the time of the deceased's date of death? Yes  No

If you answer **Yes** to either of these questions, please provide specific details on how you were financially dependent or interdependent on the deceased at the date of their death.

For consideration to be given to an interdependency relationship, you must provide details of the circumstances of the relationship, including (where relevant) the duration of the relationship; the reputation and public aspects of the relationship; whether or not a sexual relationship existed; the degree of emotional support; the ownership, use or acquisition of property; the extent to which the relationship was one of mere convenience; the degree of mutual commitment to a shared life; the care and support of children; any evidence suggesting that the parties intended the relationship to be permanent (i.e. mortgage contracts, rental agreements, etc.)

3. In addition to the above circumstances, the existence of a Statutory Declaration signed by one of the people confirming the existence of an interdependent relationship with the other person can also be taken into consideration. This Statutory Declaration can be made by the surviving party, or could have been made by the deceased member prior to death. Please provide further details.

4. Are there any other circumstances of which the trustee of First State Super should be aware?

5. I authorise the trustee of the fund to disclose all information and documentation provided by me, including any personal information in support of my claim for the death benefit, to the other claimants for that benefit or their legal personal representatives or agents. This includes the provision of photocopies or other facsimiles of the information and documentation if required. (Please cross **X** one) Yes  No



# Notes for completing the payment of a death benefit form

All our forms are available on our website under **Forms**. You can type data directly into these forms, print them and send them to us. If you prefer to write on the forms, please use a dark pen and print clearly.

## Checklist

- If you are intending to make a claim, have you fully completed **Sections 1, 2, 3, 4, 5, 6 and 8**?
- If you are NOT intending to make a claim, have you fully completed **Sections 1, 2, 3, 4, 5, 7 and 8**?
- Have you provided a certified copy of the deceased member's Death Certificate?
- Have provided a certified copy of the deceased's proof of age, (i.e. Birth Certificate, Passport, Drivers Licence)?
- Have provided a certified copy of the claimant's proof of age, (i.e. Birth Certificate, Passport, Drivers Licence)?
- Have you provided a certified copy of the deceased's Marriage Certificate (ceremonial certificates cannot be accepted)?
- Have you provided a certified copy of the deceased's Will?
- Have you provided a certified copy of the Grant of Probate of the Will?
- Have you provided a certified copy of the Letters of Administration?
- Have you provided a certified copy of adoption documentation?
- Have you provided two Statutory Declarations verifying that you are in a de facto or interdependent relationship?
- Have you provided divorce papers or decree nisi?
- Have you provided a change of name document (such as a Certificate of Marriage or Deed Poll certificate)? For other acceptable name change documents, please contact us.

## Definitions

### Dependant

The term 'dependant' means any one or more of the following:

1. the spouse of the deceased, including a de facto or same-sex spouse;
2. any child of the deceased member including an adopted child, a stepchild or an ex-nuptial child, regardless of whether the child was financially dependent on the member;
3. any other person who, in the opinion of the trustee, was wholly or partially dependent on the deceased at the deceased's date of death;
4. any person the trustee considers to have been in an interdependency relationship with the deceased at the deceased's date of death.

### Financial dependency

Financial dependency means the person depended upon the deceased member, either wholly or partially, for some level of financial support at the deceased member's date of death. This may be any person who depended on the deceased member for financial support to maintain his or her normal standard of living over a period of time.

### Interdependency

Two people will have an interdependency relationship if:

- they have a 'close personal relationship'; and
- they live together; and
- one or each of them provides the other with financial support; and
- one or each of them provides the other with domestic support and personal care

### OR

- they have a 'close personal relationship'; and they do not live together, nor provide each other with financial support, nor provide each other with domestic support and personal care because one or both of them suffer from a disability

### OR

- they have a 'close personal relationship'; and
- they live together; and
- one or each of them provides the other with financial support; and
- one or each of them provides the other with support and care of a type and quality normally provided in a close personal relationship, rather than by a mere friend or flatmate

### OR

- they have a 'close personal relationship'; and
- they do not live together, nor provide each other with domestic support and personal care because they are temporarily living apart.

A 'close personal relationship' is one that involves a demonstrated and ongoing commitment to the emotional support and wellbeing of the two parties. Two persons do not have an interdependent relationship if one of them provides domestic support and personal care to the other:

- under an employment contract or a contract for services; or
- on behalf of another person or organisation such as a government agency, a body corporate or a benevolent or charitable organisation.

Please refer to our fact sheet *Nominating beneficiaries and claiming a death benefit* for further details regarding the supply of information relating to interdependency relationships.

# Who can certify your documents?

## What is a Statutory Declaration?

A Statutory Declaration is a written statement that allows a person to declare something to be true. When you make a Statutory Declaration, you are declaring that the statements in it are true. If you intentionally make a false statement in a declaration, you can be charged with an offence. The penalty for making a false statement in a Statutory Declaration is a maximum of four years imprisonment. A Commonwealth Statutory Declaration must be signed in the presence of someone who is on the list of authorised witnesses (see list below).

## Certifying personal documents – proof of identity

You must provide certified documentation verifying the deceased's identity before your application can be processed. This is a three-step process:

- 1 Collect your originals**  
Collect your proof of identity document(s). We have listed the documents you can use below.
- 2 Photocopy your originals**  
Photocopied documents must be properly certified.
- 3 Certify your photocopies**  
Take your photocopies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

### EITHER:

A certified copy of one of the following documents:

- current Australian state/territory driver's licence with your photograph
- Australian passport
- card issued under a state or territory for the purpose of providing a person's age containing a photograph of the person
- foreign passport or similar travel document containing a photograph and the signature of the person\*

### OR:

One certified document from this list: **AND** One certified document from this list:

- an Australian birth certificate or extract issued by a state or territory
- a citizenship certificate issued by the Commonwealth
- a current Centrelink pension card that entitles you to receive financial benefits
- a notice issued by the ATO within the last 12 months that shows your name and current residential address and the provision of financial benefits to the individual e.g. your last tax return
- a notice issued by a local council or utilities provider in the last three month e.g. rates notice, electricity or water bill
- a notice issued by Commonwealth, state or territory government within the last 12 months showing your name and current address e.g. Centrelink letter

\* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

## Have you changed your name?

If you have changed your name, you will need to provide one of the following certified documents:

- marriage certificate issued by the Births, Deaths and Marriages Registration Office (please don't send your ceremonial certificate as this cannot be accepted)
- Deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name on divorce, we will require a divorce certificate and a link document such as your marriage certificate showing your original maiden name.

For other acceptable name change documents, please contact us.

## Certification of personal documents

All copied pages of original POI documents (including any change of name documents) need to be certified as true copies by an authorised person (see below). The authorised person must sight the original and the copy to ensure both documents are identical, then make sure all pages have been certified by writing 'I certify that this document is a true copy of the original', followed by their signature, printed name, qualification (e.g. Justice of the Peace, Australia Post employee, etc.) and date. The following people can certify copies of the originals:

- police officer
- Australia Post employee in charge of an office providing postal services (charges may apply)
- officer or an authorised representative of an Australian Financial Services Licensee (AFSL) with two or more year years continuous service
- medical practitioner
- legal practitioner
- pharmacist
- Justice of the Peace
- magistrate
- nurse
- optometrist
- dentist
- chiropractor
- physiotherapist
- psychologist
- veterinary surgeon
- full-time teacher employed at a school or tertiary institution

**i** Samantha Sample has provided a copy of her identification that included **signature, full name, date of birth and current residential address.**

**✓** The authorised person has sighted the original identification, and confirmed that the copy is a certified true copy.

**✓** Details for the authorised person are included: full name, qualification, registration number (if applicable), date and signature.

**Driver Licence**

Samantha SAMPLE Card Number 2 123 456 789

123 ANY ST  
SUBURB NSW 2000

Licence No. 12345678  
Licence Class C

Driver A  
Conditions S

Signature

Date of Birth 01 JAN 1980 Expiry 01 JAN 2015

"I certify that this document is a true copy of the original."

*K Anderson*

Name: Kate Anderson  
Qualification: JP  
Registration no: 123456  
Date: 31 March 2013