Australian Government
Commonwealth Superannuation Corporation

SRR1
08/26

Redundancy—Benefit application

Explanatory notes and form

Important information about this form

Before you start

Before you complete this benefit application form, please read the CSS Product Disclosure Statement (PDS).

This form and the Explanatory notes are for any CSS member who is in the process (or has accepted an offer) of involuntary or voluntary redundancy. This includes dismissal initiated by the employer on the grounds of inefficiency.

What we need from you

To help us process your benefit claim quickly, make sure you:

- fully understand your benefit entitlements.
- complete the form fully and accurately.
- send your completed application and any supporting documents directly to us. Instructions are provided at the end of the form.
- if you elect to take a pension, preserve or postpone your benefit, it is important you tell us if you change your postal address or bank account details. This allows us to send you information each year about your benefit and make payments to the correct account.

Elections to preserve benefits in CSS must be made within 21 days of retirement date.

If you are preserving your benefit and then electing for immediate payment of the Deferred Benefit, both the election to preserve and the application for payment of the Deferred Benefit must be signed, dated and submitted to us prior to the nominated claim date. This means that it is not possible for you to backdate your claim (refer to **Section E** of the Explanatory notes for further details).

All other elections can be made up to three months prior to your retirement date and up to three months after.

What you can expect from us

- After we receive your application form we will check that it's complete and correct.
- We will contact you if there are any issues.
- Once your benefit has been processed, we will send you a letter with the details of your entitlement.

Where can I find out more about my benefit entitlements?

- Speak to a licensed professional such as a financial planner (see following page for more information).
- Visit **csc.gov.au**
- See our **CSS Redundancy** factsheet.
- Read your **CSS PDS** and your Tax and your **CSS super** booklet.
- Get a benefit estimate using **CSC Navigator**.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this ☐ with a cross (✕) then fill out the next question or section.

Submitting your form

Return it, with any attachments directly to us. Instructions are provided at the end of the form. They will then forward the completed form to us. Please take a copy of your completed form for your records.

CSC — CSS Commonwealth Superannuation Scheme

The information provided 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 and needs. You may wish to consult a licensed financial adviser. You should obtain a copy of the CSS Product Disclosure Statement (PDS) and consider its content 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

Financial advice for your needs and goals

Obtaining professional advice from an experienced financial planner can help you reach your financial goals.

CSC's authorised financial planners* provide 'fee for service' advice, which means you receive a fixed quote upfront. There are no obligations, commissions or hidden fees.

To arrange an initial advice appointment please call **1300 277 777** during business hours.

* Our authorised financial planners are authorised to provide advice by Guideway Financial Services (ABN 46 156 498 538, AFSL 420367). Guideway is a licensed financial services business providing CSC financial planners with support to provide members with specialist advice, education and strategies.

Explanatory notes

Section A – Personal details

Please complete all the boxes in this section. It enables us to identify you and any other potential beneficiary and tells us where we can contact you.

Relationship details

Details of your relationship status. You may wish to include a copy of your marriage certificate or registered relationship certificate with your application. This would speed up the process in the event that a spouse's benefit becomes payable.

For the definition of a spouse for death benefits, see the **Death Benefits** factsheet at **csc.gov.au**

Contact details

The postal address you provide is where all correspondence will be sent unless you have elected to receive correspondence electronically.

Contact phone numbers are also required, in case we need to contact you regarding the payment of your benefit. Your current work number is useful if you submit your application form before the date of exit, as this will allow us to check information with you quickly.

If you have email access, either at work or at home, inclusion of your current email address will be helpful.

Section B – Identification requirements

To guard against fraud, money laundering and terrorism financing, you need to provide us with information to verify your identity before your request can be processed. The identification documents you send us will be verified electronically using the Document Verification System, or you can provide certified copies of your documents with your application. If you supply certified documents, the person certifying them must attest that the documents are true copies, and that you are the valid holder of the identification. Copies of your documents will be scanned and stored on our secure document management system.

Section C – Employment details

Permanently retired from the workforce

If you have reached preservation age but are under age 60, you are considered to be permanently retired from the workforce if you have ceased an arrangement under which you were gainfully employed (ie more than 10 hours per week), and you intend never to again become gainfully employed, either on a full-time or part-time basis. If you are over age 60, you are considered to be permanently retired from the workforce if the arrangement under which you were gainfully employed (ie more than 10 hours per week) has ended and either you attained age 60 on or before that employment ended, or you intend never to again become gainfully employed, either on a full-time or part-time basis.

Note: giving false or misleading information is a serious offence.

Re-employment with another government agency

If you have been offered or have made arrangements for re-employment on a full-time or part-time basis with another department, authority or instrumentality being an approved authority for the purposes of the S*uperannuation Act 1976*, you may not yet be entitled to a CSS benefit. For more information, contact **members.aps@contact.csc.gov.au** or call **1300 000 277**.

Section D – Benefit options

Option 1: Preserve Entire Benefit

By choosing this option, you are electing to preserve your entire benefit in CSS for either:

- payment at a later date (a Deferred Benefit); or
- payment of a transfer value to an eligible scheme.

Your election to preserve can be made up to one month before, but no later than 21 days after, your cessation date.

Payment at a later date: You can claim a Deferred Benefit once you have reached minimum retirement age. The table shown under this option on your benefit estimate shows an estimate of the benefit payable at different ages.

Transfer value to an eligible scheme: By choosing this option, you are electing to transfer your entire benefit to an eligible superannuation scheme—please note this is not a rollover. You will no longer be a member of CSS.

To be eligible for this option, you must be a member of an eligible superannuation scheme as a result of your employment, and must become a member within three months of ceasing to be a contributor of CSS. Please refer to the list of eligible superannuation schemes on page 4.

Option 2: Maximum pension

This option is only available if you are over age 55.

This option gives you a standard CPI-indexed pension together with an additional non-indexed pension funded by your member and productivity components.

As there is a limit on the amount of non-indexed pension you can take, we will pay any excess member and/or productivity component as a lump sum, subject to cashing restrictions.

Option 3: Maximum pension, lump sum of productivity

This option gives you a standard CPI-indexed pension, an additional non-indexed pension funded by your member component and a lump sum of your productivity component. If you are under preservation age, your lump sum of productivity component must be preserved in an eligible rollover fund until you have met a condition of release with a nil cashing restriction.

As there is a limit on the amount of non-indexed pension you can take, we will pay any excess member component as a lump sum in addition to your productivity component, subject to cashing restrictions.

Option 4: Standard pension, lump sum of member and productivity

This option gives you a standard CPI-indexed pension plus a lump sum of your member and productivity components, subject to cashing restrictions.

Option 5: Full lump sum

This option gives you a lump sum (subject to cashing restrictions) based on 3.5 times your accumulated basic contributions and fund earnings, plus any supplementary contributions and your productivity component.

Option 6 – Postpone your benefit

This option allows you to postpone some or all of your benefit in CSS for payment at a later date.

When you claim your postponed benefit, your standard pension will be based on your final salary updated by AWOTE, your contributory service at the time you ceased to be a contributor and your age at the date the benefit becomes payable. Postponed benefits must be paid by age 65.

If you postpone your entire benefit, your member and productivity components can be taken as a lump sum or an additional pension. If you elect to claim your member com-ponent upon ceasing (either as a lump sum or additional non-indexed pension) your productivity component will only be payable as a lump sum. All lump sum benefits are subject to cashing restrictions.

This option is only available if you are aged less than 65 and are remaining in the workforce.

Section E – Immediate payment of Deferred Benefit

If you have already reached (or will shortly be reaching) your minimum retiring age you can also use this form to claim your Deferred Benefit.

You must, however, first complete a valid election for a Deferred Benefit in **Section D**, **Option 1**.

You can use this section to claim your Deferred Benefit provided that:

- the date you wish to claim your Deferred Benefit from is no earlier than the day you reach your minimum retiring age.
- both your Deferred Benefit election and your application for payment of the Deferred Benefit are signed and dated prior to the nominated claim date.
- the election is within the specified time limit for making elections.

Note: Interest on CSS Deferred Benefits is generally calculated up to the date your application is processed, not your claim date or the date you complete this application. CSS fund earnings can be positive or negative. You should keep this in mind when planning your retirement.

Your claim date is still important, as it's the day before your pension starts.

Section F – Your pension payment

Account details

We can only pay your pension into an Australian account held in your name. If it's a joint account, one of the names listed must be yours.

Election for reduced initial pension benefit in return for increased spouse's and/or children's pension benefit

If you tick '**Yes**', we will reduce your pension to 93% of your full pension amount. In return, your eligible spouse will be entitled to 85% of your pension benefit. Benefits to eligible children or orphans also increase under this option.

If you tick '**No**', if a spouse's pension becomes payable, your spouse will be entitled to 67% of your pension entitlement at date of death.

If you do not make an election, your benefit will be processed as not making an election to take a reduced pension.

You should be aware you can't change your choice if your situation with your spouse and/or children changes after you make this election.

For more information about reversionary benefits, please refer to the **Death Benefits** factsheet on the **CSC website.**

Section G – Your lump sum cash payment

We can only pay your lump sum into an Australian account held in your name. If it's a joint account, one of the names listed must be yours.

Taxation legislation states that once an amount has been paid to you or deposited in your bank account, you cannot subsequently roll it over.

Cashing restrictions

The *Superannuation Industry (Supervision) Regulations 1994* determines how much of your lump sum benefit can be accessed as cash. You can access your entire lump sum benefit as cash if:

- you have reached your preservation age (see table below) and permanently retired from the workforce; or
- you have reached age 65.

However, if you have not met one of the above conditions, your access to a cash lump sum will be restricted. The amount that can be accessed as cash—your 'unrestricted component'—will vary depending on your situation, and is shown in your benefit esti-mate. Any part of the lump sum exceeding the unrestricted component is classed as 'compulsory preserved' and must be paid to a regulated super fund.

To obtain a benefit estimate email **members.aps@contact.csc.gov.au** or call **1300 000 277.**

Preservation age table

Date of birth	Preservation age
Before 1 July 1960	55 years
1 July 1960 to 30 June 1961	56 years
1 July 1961 to 30 June 1962	57 years
1 July 1962 to 30 June 1963	58 years
1 July 1963 to 30 June 1964	59 years
From 1 July 1964	60 years

Section H – Rollover details

Check that you can rollover your benefit to a complying super Fund, rollover Fund, RSA, or use it to purchase an annuity.

Rollovers

You can nominate up to two funds to receive all or part of your lump sum benefit. You will need to provide the details of the fund/s in this section, unless you nominate **Public Sector Superannuation accumulation plan (PSSap)** or **Commonwealth Superannu-ation Corporation retirement income (CSCri)** as these details have been prepopulated for you.

CSCri is an account-based income stream for those who wish to keep their lump sum benefit invested in super in retirement. CSC is the Trustee of PSSap ABN: 65 127 917 725 RSE:R1004601 and offers the CSCri. For further information, please read the PSSap and/or CSCri PDS.

We will send all rollover payments electronically to your nominated fund(s).

Can I choose which component of the benefit to rollover first?

While you may request the components of your benefit be paid in a specific manner, the payment will be subject to proportioning.

Proportioning rules require that your taxable and tax-free components be spread in equal proportions across those parts of the benefit payment you receive as cash or rollover. Additional pensions may also be affected by proportioning.

If you have specific instructions relating to cash and rollover payments, these details can be attached separately.

Section I – Superannuation contributions surcharge

You only need to fill in this section if you have an outstanding surcharge debt. Please refer to the Superannuation contributions surcharge factsheet for more information.

Section J – Taxation matters

Start date for taxation purposes

The start date relates to the date your eligible service period (ESP) started and we use it to calculate the various components of your super lump sum and additional pension payment for taxation purposes. You'll need to contact your personnel section for your ESP date.

Generally, your ESP is the number of days between the date you started APS employment, (which may be earlier than the date you joined CSS) and the date we make your payment. If your CSS membership started before 1 July 1983 and you have a long service leave start date earlier than your CSS start date, that earlier date applies as your ESP start date.

We also include earlier periods of employment for which you paid a transfer value into CSS in your ESP.

If you don't show a date in this section, we will use the date you joined CSS as your start date.

Your Tax File Number (TFN)

If you wish to receive a pension, we suggest you complete and send us the **Tax File Number declaration** form from the ATO.

If you don't give us your TFN, we are required to deduct tax at the top marginal rate plus the Medicare levy from your benefit. If you don't provide us with your TFN, we are required to withhold tax from your lump sum benefit at the top marginal tax rate plus the Medicare levy.

We may, however, already have your TFN on file. You can confirm by emailing **members.aps@contact.csc.gov.au** or calling **1300 000 277**.

If you wish to receive a pension, we suggest you complete and send us the **Tax File Number declaration** form from the ATO. **The information you provide on this form will be used to determine the rate of tax payable on your pension, specifically whether you will be claiming the tax free threshold or not. If you do not provide this form, we will not apply the tax-free threshold to your pension.**

Approval to advise your TFN to rollover funds

We will give your TFN to the receiving Fund unless you instruct us not to. Please note there are consequences for not supplying your TFN to a Fund.

Note: CSS is required to validate your TFN with the ATO's records to confirm the TFN provided is yours and correct. Your TFN will be validated before your benefit can be rolled over to another fund or paid using the SuperTICK validation service. If you do not provide your TFN, the processing of your benefit payment may be delayed.

Section K – Declaration

If you don't sign this section, your form will be returned to you and your payment may be delayed.

Privacy

We're committed to protecting your privacy. We collect your personal information for the purposes of providing superannuation services to you, improve our products and to keep you informed. We will only share your personal information where necessary for providing superannuation services to you.

This may include disclosing your personal information to our scheme administrator, service providers or government or regulatory bodies. Your personal information may be accessed overseas by our service providers. Please see our privacy policy for full details.

Your personal information will not be otherwise used or disclosed unless required or permitted under law. A full copy of our privacy policy as well as the privacy complaint process is available at **csc.gov.au/privacy**

List of eligible superannuation schemes

The information below is intended only for those members who have elected to transfer their full entitlement to an eligible superannuation scheme. If you have elected to rollover your member component to a rollover fund or RSA, you may nominate any superannuation scheme or RSA and are not restricted to those listed below.

You may elect to have a transfer value paid to an 'eligible superannuation scheme' if:

- you are a member of the eligible superannuation scheme as a result of public or government employment;
- you have preserved your entire benefit in CSS; and
- the trustee or administrator of the eligible superannuation scheme agrees to accept the transfer.

Each of the following is an eligible superannuation scheme:

- DFRDB
- Northern Territory Government and Public Authorities Superannuation Scheme
- Parliamentary Contributory Superannuation Scheme
- Queensland Parliamentary Contributory Superannuation Scheme
- UniSuper Accumulation 2 Plan.

The transfer value will include all your defined benefit equity, as well as any transfer amounts. If you elect to have your benefit paid as a transfer value, you will no longer be a member of CSS and no further benefits will be payable.

Australian Government
Commonwealth Superannuation Corporation

SRR1
08/26

Redundancy—Benefit application

Form start

Read the Explanatory notes and each section of the form carefully before filling it in.

A Personal details

Reference number (AGS)

Cessation date D D / M M / Y Y Y Y

Title ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Surname

Given name(s)

Date of birth D D / M M / Y Y Y Y

Previous memberships: Have you had any other periods of CSS membership? If so, please list the reference number(s) (AGS) for each of those memberships.

1. 3.
2. 4.

Relationship details ☐ Single ☐ Married ☐ De facto

Date commenced de facto relationship (if applicable) D D / M M / Y Y Y Y

Spouse's surname

Spouse's given name(s)

Spouse's date of birth D D / M M / Y Y Y Y

Your residential address
Street
Suburb/town State Postcode

Your postal address
Street
Suburb/town State Postcode

CSC — CSS Commonwealth Superannuation Scheme

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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

Your phone numbers

Business hours

After hours

Mobile number

Would you like to receive an SMS to confirm we have received your application? ☐ Yes ☐ No

Your email

Once your payment has been finalised, confirmation will be sent to you using the communication preference recorded on your account. You can change your communication preference at any time via **CSC Navigator**.

B Identification requirements

To confirm your identity, we require some information from you—this is to protect your benefit against fraud, money laundering and terrorism financing, under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

Verifying your documents

Identifying documents may be verified through the Document Verification Service (DVS). DVS is 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.

Further information about the DVS, and the operation and management of the DVS Hub, is available from **IDMatch** at **www.idmatch.gov.au/** and the **Attorney-General's Department** at **www.ag.gov.au/**.

If you don't provide authorisation to have documents verified electronically or your documents are incompatible with DVS, you will need to provide certified copies of required documents.* Please also refer to the section Certifying your documents.

*** DVS is only compatible with some identification documents, these have been listed below.**

An electronic copy of your identification 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 purpose of confirming your identity. You need to send in identification with every application.

Certifying your documents

If you're providing certified documents, the certifying authority must confirm in writing that any copies are true copies of the original.

Important: The certification must include the name, signature, qualification and registration number of the certifying authority (if applicable), and the date of the certification. Note: we require a copy of both sides of your identification document. If your certified copy is a physical document, it must be sent by post. We cannot accept a photo or scan of a certified copy.

The following sample of certifying authorities can certify your documents in Australia:

- Dentist
- Employee of a Commonwealth authority engaged on a permanent basis with five or more years of continuous service who is not specified elsewhere in this document
- Financial Adviser or Financial Planner
- Justice of the Peace (JP)
- Legal Practitioner
- Medical Practitioner
- 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 five or more years of continuous service; or
  - a Warrant Officer within the meaning of that Act.
- Notary Public
- Nurse
- Occupational therapist
- Physiotherapist
- Psychologist.

For a full list of certifying authorities refer to **Schedule 1** of the *Statutory Declarations Regulations 2023* available at **www.legislation.gov.au/F2023L01753/**

Meeting the identification requirements

You only need to provide **one** document from the **Primary photographic identification** category.

If you can't provide any **Primary photographic identification** you will need to provide **one** secondary identification document from List A **AND one** secondary identification document from List B. We can only accept documents that are listed below for identification purposes.

If the name we hold on file for you is different to the name on your identification, or two pieces of identification are in different names, please provide a certified copy of your **Marriage** or **Change of Name certification**.

If you would like us to use DVS to verify your identification, please check both boxes below.

☐ I confirm that I am authorised to provide the personal details presented and I consent to the information being checked with the document issuer or official record holder via third party systems for the purposes of confirming my identity.

☐ I have attached identification for DVS verification.

Continued on next page

You must provide a copy* of one of the following:

Primary photographic identification

DVS compatibility* is shown as ✓ or ✗

- ✓ A current Australian Driver's Licence (front and back of licence must be provided).
- ✓ A current Australian Passport (or one which has expired within the last two years).
- ✗ A current Australian Proof of Age card (issued under a State or Territory law).

*** If your documents are incompatible with DVS, don't forget to provide certified copies.**

Secondary identification requirements

Only provide these documents if you're unable to provide **one** of the **Primary photographic identification** documents.

List A	List B
✓ Your Australian Birth Certificate or extract issued by a State or Territory. **Please note:** Birth Certificate extracts and Birth Certificates issued before 1970 may not be verified by DVS.	✗ Your notice issued by the Australian Taxation Office (ATO) within the last 12 months that shows your name, current residential address, and records an amount payable either to or from the ATO.
✓ Your Citizenship Certificate issued by the Commonwealth.	✗ Your notice issued by a local council or utilities provider in the last three months showing the provision of services and current residential address. **Example:** rates notice, electricity or water bill.
✗ Your current Pensioner Concession Card issued by the Department of Human Services.	✗ Your notice issued by the Commonwealth or a State or Territory government within the last 12 months showing your name and current residential address, and the provision of a financial benefit. **Example:** a Centrelink letter.

Members residing overseas

If you live overseas and need to have documents certified, it needs to be done by a person in that foreign country who is authorised by law in that jurisdiction to administer oaths or affirmations or to authenticate documents. For more information refer to **ag.gov.au** and **dfat.gov.au**. Documents provided in a foreign language must be accompanied by a certified translation completed by an accredited translator.

Persons residing overseas, foreign residents or anyone wishing to receive payments into an foreign bank account, please contact us to confirm this option and the necessary documentation requirements.

***Don't send original documents.**

C Employment details

Are you permanently retired from the workforce? Select only one option.

☐ Yes

☐ No. I will be employed by the following Australian Public Service agency*:

* If you wish to cease membership of CSS whilst continuing in employment with the same employer, you should not complete this form; you should complete a **Cessation of CSS scheme membership** form. For more information call **1300 000 277**.

☐ No. I will be employed by a non-government employer for more than 10 hours per week.

D Benefit options

Select only one option.

☐ **Option 1:** Preserve entire benefit. I elect to:

- ☐ **1a:** Preserve as deferred benefit—go to **Section K, OR**
- ☐ **1b:** Claim as an immediate deferred benefit—go to **Section E, OR**
- ☐ **1c:** Pay as transfer value to an eligible scheme— please provide fund details in **Sections E** and **Section H**.

Continued on next page

☐ **Option 2:** Maximum pension—go to **Section F** for pension payment instructions, then **Sections G** and/or **Section H** for lump sum payment instructions.

☐ **Option 3:** Maximum pension, lump sum of productivity—go to **Section F** for pension payment instructions, then **Sections G** and/or **Section H** for lump sum payment instructions.

☐ **Option 4:** Standard pension, lump sum of member and productivity—go to **Sections F**, **Section G** and/or **Section H.**

☐ **Option 5:** Full lump sum—go to **Section G** and/or **Section H**.

☐ **Option 6:** Postpone your benefit (only available if you have not left the workforce.)

- ☐ **6a:** Postpone entire benefit—go to **Section K**, **OR**
- ☐ **6b:** Claim lump sum, postpone remaining benefit—go to **Section G** and/or **Section H** for lump sum payment instructions, **OR**
- ☐ **6c:** Claim additional pension, postpone remaining benefit—go to **Section F**.

E Immediate payment of a deferred benefit

Only valid if you will have reached your minimum retiring age as at your claim date and you have already elected **Option 1.**

I hereby give written notice to CSC that I wish to claim my deferred benefit on:

D D / M M / Y Y Y Y

(the deferred benefit pension will commence with effect from the day after the claim date)

Please pay my benefit as (please tick one):

☐ **Option 1**—Maximum pension

☐ **Option 2**—Maximum pension, lump sum of productivity

☐ **Option 3**— Standard pension, lump sum of member and productivity

F Your pension payment

Account details of your pension payment

Attach a copy of your recent bank statement which shows your account name, BSB and account number. Note that pensions can only be paid to an account in your name and must be in Australia. This can be a joint account.

Name of institution

Name of account holder

Branch (BSB) number –

Account number

Note: If the BSB or account number you provide is incorrect the payment will not be accepted by your financial institution. If you have any doubts what your correct BSB or account number is, you should confirm these details with your financial institution before including them in this form.

Election for reduced initial pension benefit in return for increased spouse's and/or children's pension benefit

Do you want to take a reduced pension?

I have read the information contained in **Section F** of the Explanatory notes and

☐ advise that I do not wish to take a reduced pension of 93% of my initial pension entitlement.

☐ elect to take a reduced pension of 93% of my initial pension entitlement.

G Your lump sum cash payment (if applicable)

Attach a copy of your recent bank statement which shows your account name, BSB and account number.

I would like to rollover (please choose one):

☐ a percentage of the total lump sum ☐☐☐ %

OR

☐ a gross dollar amount of $ ☐☐☐☐☐☐☐☐

OR

☐ the benefit balance after my rollovers.

Type of financial institution ☐ Savings bank ☐ Building society ☐ Credit union

Name of institution

Name of account holder

Branch (BSB) number ☐☐☐ – ☐☐☐

Account number ☐☐☐☐☐☐☐☐

Note: If the BSB or account number you provide is incorrect the payment will not be accepted by your financial institution. If you have any doubts what your correct BSB or account number is, you should confirm these details with your financial institution before including them in this form.

H Rollover details

I would like to rollover (please choose one):

☐ my compulsorily preserved component ONLY, **OR**

☐ my entire lump sum benefit, **OR**

☐ only part of my lump sum benefit (please chose one)

- ☐ a gross dollar amount of $ ☐☐☐☐☐☐☐☐
- **OR**
- ☐ a percentage of lump sum ☐☐☐ %

OR

☐ the balance after lump sum payment.

If you wish to and are eligible to roll over to Public Sector Superannuation accumulation plan (PSSap) or Commonwealth Superannuation Corporation retirement income (CSCri) please complete **option H1** below. If you wish to rollover to any other fund or RSA, please complete **option H2**.

H1. Rollover to PSSap or CSCri

I would like to rollover (please choose one): ☐ PSSap ☐ CSCri

Are you already a PSSap or CSCri member? ☐ Yes ☐ No—I have applied for PSSap Ancillary member or CSCri member.

PSSap member number ☐☐☐☐☐☐☐☐☐☐

If **No**

If you are joining PSSap as an Ancillary member, please complete a Join **PSSap as an Ancillary member** form. This form is available as an online form or as a PDF available at **csc.gov.au** If you complete the PDF version, please send it to the PSSap details provided below when you provide your **CSS Redundancy benefit application** form to your employer.

If you are joining CSCri please complete the **Apply for CSC retirement income** form available at **csc.gov.au** and send it to the CSCri details provided below when you provide your **CSS Redundancy benefit application** form to your employer. If you are already a PSSap Ancillary Member your rollover will be paid into your PSSap ancillary account prior to starting the retirement income stream from CSCri.

Continued on next page

Details for rollover to PSSap or CSCri

Name of fund	**Public Sector Superannuation accumulation plan**
ABN of fund	**65127917725**
Postal address fund	**PSSap Locked Bag 20117 Melbourne VIC 3001**
Unique Superannuation Identifier (USI) of fund	**65127917725001**
Name of fund	**Commonwealth Superannuation Corporation retirement income (part of Public Sector Superannuation accumulation plan)**
ABN of fund	**65127917725**
Postal address fund	**CSCri Locked Bag 20115 Melbourne VIC 3001**
Unique Superannuation Identifier (USI) of fund	**65127917725002**

H2. Rollover to other fund or retirement savings account (RSA)

If you are splitting your benefit between two funds, copy this page, complete the details and attach to this form.

Name of fund or RSA

Australian Business Number

ABN of fund

Membership number for fund or RSA
(known as Member Client Identifier)

Unique Superannuation Identifier

USI of fund or RSA

Street

Postal address of fund

Suburb | State | Postcode

H3. Rollover to a self-managed super fund (SMSF)

Attach a copy of your recent bank statement which shows your account name, BSB and account number.

Name of SMSF

Australian Business Number

ABN of fund

Electronic service address (ESA)

Account name

Branch (BSB) number –

Account number

I Superannuation contributions surcharge

I would like my outstanding superannuation contributions surcharge debt deducted from either:

- ☐ my standard CPI-indexed pension (permanent reduction), **OR**
- ☐ my additional non-indexed pension (permanent reduction), **OR**
- ☐ my lump sum benefit (if applicable).

J Taxation matters

What is your start date for taxation purposes? D D / M M / Y Y Y Y

What is your Tax File Number (TFN)?

☐ Tick this box if you do not want us to provide your TFN to another super fund

If you have elected to take a pension, you may complete a **Tax File Number declaration** form (available from the ATO or your personnel section) to claim any available tax offsets and deductions. Attach the completed declaration to this application form.

TFN declaration

- ☐ Yes, I have attached TFN Declaration form.
- ☐ No, I do not wish to provide a TFN Declaration form.

Please refer to **ato.gov.au** to complete Tax File declaration online and attach the completed declaration to this application form.

Note: We are required to validate your TFN with the ATO's records to confirm the TFN provided is yours and correct. Your TFN will be validated before your benefit can be rolled over to another Fund or paid using the SuperTICK validation service. If you do not provide your TFN, the processing of your benefit payment may be delayed.

K Declaration

I declare that:

- I have been advised to read the **CSS PDS**.
- I had not been offered a full-time or part-time job with an employer who takes part in CSS arrangements
- before completing this form on or before the date I was involuntarily retired.
- I have been given enough information about the benefit options available to make an informed decision.
- The information I have provided is true and correct to the best of my knowledge. I acknowledge that it may be a criminal offence to knowingly provide false or misleading information or documents.
- By choosing a benefit option in **Section D**, I understand that I am making a formal election under the provisions of the CSS legislation and this benefit election cannot be changed, except in certain circumstances approved by CSC.
- I have made an election regarding the reduced pension option in **Section F** (if applicable) and understand that I cannot change this election.

Sign

Signature

Date signed D D / M M / Y Y Y Y

For futher information email **members.aps@contact.csc.gov.au** or call **1300 000 277**.

L Member checklist

I have:

- ☐ filled in all the sections applicable to me,
- ☐ completed the identification requirements in **Section B**,
- ☐ selected a benefit option in **Section D**,
- ☐ completed a reduced pension election and account details in **Section F** (if applicable),
- ☐ completed cash payment and account details in **Section G** (if applicable) and attached a copy of my recent bank statement.
- ☐ included rollover fund details for my compulsorily preserved amount in **Section H** (if applicable),
- ☐ attached my completed **Tax File Number declaration** form (for pension recipients only),
- ☐ signed the declaration in **Section K**.

If you need more information, call **1300 000 277** or email **members.aps@contact.csc.gov.au**

M Lodgement

You have now completed this form.

Please return it, along with any attachments, to:

CSS
GPO Box 2252
Canberra ACT 2601

or email to **formsandapplications@csc.gov.au**

Please keep a copy of your completed form for your records.

We'll action your application as quickly as possible. Our processing time is generally 10–15 business days from the nominated claim date. However, delays in processing may occur if:

- your application is not completed fully or is invalid;
- you don't provide sufficient identification;
- your benefit requires manual calculation.

Save form Clear form

For more information visit csc.gov.au

The information provided 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 and needs. You may wish to consult a licensed financial adviser. You should obtain a copy of the CSS Product Disclosure Statement (PDS) and consider its content 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