



Application for Estate Benefits on death of an Associate

Important information about this form

Who should use this form?

This form should be completed if you are claiming a benefit in respect of a deceased Associate of MilitarySuper who is not survived by an eligible spouse, child or children.

Associate A and Associate B benefits

The deceased's benefit may consist of one or both of the following:

Associate A benefit – is a taxed benefit that is held for a person as units in one or more Investment Divisions in MilitarySuper.

Associate B benefit – is an untaxed benefit that is indexed annually at the long-term bond rate.

Payment

Lump sum payments are normally paid within 15 working days after the date the Delegate approves an application.

There is no pension option available.

Rollover cheques are normally paid within 15 working days after the date we receive all necessary documentation to enable us to process your application.

For more information

If you wish, you can seek further information on your options and completion of this form from us on **1300 006 727**.

You can also read the **MilitarySuper Product Disclosure Statement (PDS)** available at csc.gov.au

A Financial Advisor may also be able to assist.

How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this with a ✓ or ✗ then fill out the next question or section.

Submitting your form

Send your completed application and attachments to:

MilitarySuper
GPO Box 2252
Canberra ACT 2601
Australia



**Military
Superannuation &
Benefits Scheme**

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Application for Estate Benefits on death of an Associate

Form start

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

A About the deceased

1. Service Navy Army RAAF
 Service number/Employee ID

2. Title Mr Mrs Ms Miss Other
 Surname
 Given name(s)

3. Former surname (if applicable)

4. Date of birth / /

5. Date of death / /

Please attach a certified copy of the death certificate or forward later when available.



Military
Superannuation &
Benefits Scheme

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B

Your details

6. Title Mr Mrs Ms Miss Other

7. Surname

8. Given name(s)

9. Date of birth / /

10. Postal address

SUBURB STATE POSTCODE

Residential address

SUBURB STATE POSTCODE

11. Was the deceased married, or in a de facto relationship?
 Yes
 No

Person's name

Person's address

SUBURB STATE POSTCODE

12. Did the deceased have any children under age 25?
 Yes
 No

Child's name

Guardian's name

Child's/Guardian's address

SUBURB STATE POSTCODE

If there is more than one child/guardian, please attach another sheet with these details.

C

About the person handling the affairs of the Estate

13. Name

14. Firm name (if applicable)

15. Date of birth / /

16. Postal address

Residential address

SUBURB STATE POSTCODE

17. Contact details

BUSINESS HOURS

AFTER HOURS

MOBILE NUMBER

FAX NUMBER

The person handling the affairs of the Estate is required to provide identification details in accordance with **Part F**. Please note that beneficiaries who are entitled to 25% or more of the Estate are also required to provide identification details in accordance with **Part F**. Please attach multiple copies of **Part F** with required attachments (if any) and information.

D

About the Estate

18. Did the deceased leave a Will?
 Yes – go to **Question 22**
 No
19. Is it intended to take out Letters of Administration?
 Yes – please forward a copy when available, go to **Part F**
 No – go to **Part E**
20. Is it intended to take out Probate?
 Yes – please forward a copy when available, go to **Part E**
 No – go to **Question 23**
21. Were other beneficiaries nominated in the Will?
 Yes – go to **Question 24**
 No – go to **Part F**

22. Please ensure all other beneficiaries (over age 18) sign.

I hereby agree to payment of the amount due to the Estate be forwarded to the person shown at **Question 13** and where I am entitled to 25% or more of the Estate. I have provided identification details in accordance with **Part F**.

Full name of other Beneficiary

E

Payment details

23.

Please provide details of the account you want the benefit paid into. The account must be in Australia.

Type of financial institution Savings bank Building Society Trading bank Credit union

Name of institution

Name of account holder

Branch location

Branch (BSB) number

Account number

F

Identification requirements

24.

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.

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.

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.

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

Certifying your documents

If you’re providing certified documents, the certifying authority must confirm in writing you are the valid holder of the identification you are presenting, and 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.

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.
- Midwife
- Notary Public
- Nurse
- Occupational therapist
- Physiotherapist
- Psychologist.

Please note: We require a copy of both sides of your identification document.

For a full list of certifying authorities refer to **Schedule 2** of the *Statutory Declarations Regulations 2018* available at www.legislation.gov.au/Details/F2018L01296

➡ Section F continued on next page

How can I meet 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 provide authorisation by placing a check in the box 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.



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

-  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 Citizenship Certificate issued by the Commonwealth.
-  Your current Pensioner Concession Card issued by the Department of Human Services.

List B

-  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 notice issued by a local council or utilities provider in the last three months showing the provision of services and current residential address. **For example:** rates notice, electricity or water bill.
-  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. **For example:** a Centrelink letter.

Certifying your documents overseas

If you live overseas and need to have documents certified, it needs to be done by a person in a 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 and foreign residents may need to contact us.

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

