

Application for Invalidity Benefits

Important information about this form

Who should use this form?

Use this form if you are a member of the **Military Superannuation and Benefits Scheme** (MilitarySuper) and you are being transitioned from the ADF as medically unfit for further service.

Do not use this form if you have ceased employment with the Australian Defence Forces other than on the ground of invalidity.

When to use this form

This form can be completed any time before transition and no later than three months after transition. However, it is more usual to complete the application as part of your transition procedures.

Options

Before completing this benefit application form you are advised to read the MilitarySuper Product Disclosure Statement (PDS) available from our website at csc.gov.au, or by phoning 1300 006 727.

On transition on the ground of invalidity the benefits will vary according to your invalidity classification. For more information regarding this process please read the **Invalidity Benefits** factsheet.

There are two components to your Benefit: Employer Benefit and Member Benefit. You may also have a third component, an Ancillary Benefit.

If you are over 55 and being transitioned from the ADF as medically unfit for further service, please also complete an M65 Benefit application. This is in the event you are classified **Class C** you can claim your employer benefit as a pension or lump sum

Employer Benefit

If you are classified **Class A** or **B** you will be entitled to a pension. However, if you are classified **Class C** you do not have any option to access your Employer Benefit – it must be preserved in MilitarySuper until you reach at least age 55. Your Employer benefit can be paid out earlier in some limited circumstances (e.g. severe financial hardship, specified grounds). For further details please see the **Early Access to your superannuation benefits** factsheet available from CSC website.

Member Benefit

Your Member Benefit consists of the number of units you hold in MilitarySuper plus any earnings thereon. Benefit payments result in the withdrawal of existing units at the unit price applicable on the later of:

a) the day after exit

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b) the day on which a member's application is received by us.

If you transferred from DFRDB, your Member Benefit includes your DFRDB contributions plus notional earnings on those contributions.



About this form continued on next page

The options for your Member Benefit are:

- the pre 1 July 1999 component can be taken as a cash lump sum, rolled over, or preserved in MilitarySuper
- the **post 30 June 1999** component must be preserved in MilitarySuper or rolled over to another Fund until you reach your preservation age and retire from the workforce.

If you preserve any of your pre 1 July 1999 component with MilitarySuper, any future withdrawal must be in multiples of \$10,000. There must be a minimum of six months between withdrawals.

Ancillary Benefit

You may also have an Ancillary Benefit. An Ancillary Benefit consists of any of the following that have been paid into your MilitarySuper account.

- 1. Additional Personal Contributions
- 2. Salary Sacrifice amounts
- 3. Transfer amounts
- Spouse Contributions (please note that spouse contributions are those paid by your partner into your MilitarySuper account)
- 5. Co-contributions
- 6. Super Guarantee amounts
- 7. Low income contributions

You may rollover your Ancillary Benefit at any time. The Ancillary Benefit may be cashed out once you have reached your superannuation preservation age and:

- if you are less than 60 you have permanently retired from the workforce or
- if you are aged 60 or more you have permanently retired from the workforce or your current employment has ended.

Payment

Lump sum and rollover payments are normally paid within 15 working days after your transition is confirmed or after the date we receive all necessary documentation to enable us to process your application, whichever is the later.

Rollover fund nominations

If you are choosing to rollover part of your benefit, it must be paid to a complying superannuation fund, rollover fund or Retirement Savings Account (RSA). We will not deduct tax from any amount rolled over to another fund however, the receiving fund will deduct 15% tax from any untaxed component of the rollover.

You can nominate two rollover funds or RSAs to receive all or part of your lump sum benefit. Complete one nomination if you are going to roll over your entire benefit to one fund. If you are going to split the amount, complete both nominations with details of the second fund.

We will make all rollover payments directly to your nominated rollover fund(s). Please make sure you have the correct postal address of your fund(s).

When completing this section you must include the name and Australian Business Number (ABN) for the nominated rollover fund or RSA. If you have a membership number (known as your Member Client Identifier) and a Unique Superannuation Identifier (USI) for the rollover fund or RSA, please include these numbers.

If you do not have these details, you can get them from the rollover fund or RSA. If you don't include these details, it will result in payment delays of your benefit. Please ensure your nominated rollover account(s) is active and can receive deposits from other superannuation funds. Failure to do so will result in the payment being returned to our office.

Surcharge debt

If you have a superannuation contributions surcharge debt, it will be deducted from your benefit before payment. In deducting the debt from your benefit, default provisions apply if you do not make an election after payment. CSC must receive your surcharge election in writing.

The default provisions are:

- if the Employer Benefit is converted to pension in part or full, any surcharge debt will be taken from the Employer Benefit after conversion to pension
- if the Employer Benefit is taken as a total lump sum, before tax the debt will be taken from the Employer Lump Sum Benefit.

Alternatively you can elect that instead of the default provisions applying, the debt be deducted from:

- the Employer Lump Sum Benefit before it is converted to pension or
- the Member Benefit before it is paid as a lump sum or
- the Ancillary Benefit before it is paid as a lump sum.

Proportioning

If you have not reached your preservation age and you claim your non-preserved (i.e. pre 1 July 1999) member benefit, the payment would normally include both tax—free and taxable components. However, you can choose to apply all your available tax—free amount against your lump sum (up to the amount of your pre 1 July 1999 benefit). For further information on how your benefit is taxed it is recommended that you read the **Tax and your MilitarySuper booklet** available from **csc.gov.au**.

Tax File Number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct PAYG tax at the Top Marginal Rate plus the Medicare levy from benefits if a person does not provide a Tax File Number (TFN).

We are required to validate your Tax File Number (TFN) with the ATO's records to confirm the TFN provided is yours and is correct. Your TFN can be validated using the SuperTICK validation service at any time during your MilitarySuper membership and must be validated before your benefit can be rolled over to another fund. If you do not provide your TFN, the processing of your benefit payment may be delayed.

If you have not been issued a TFN you should lodge an **Australian Taxation Office Application/ Enquiry** form with the Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

Tax File Number Declaration form

If you are eligible to claim a pension benefit please complete the Tax File Number Declaration form, available from your local Tax Office. The information you provide on this form will determine how much tax will be deducted from your pension. Please note that you can only claim the tax—free threshold against one source of income.

Advice and more information

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

We must provide you with any information you need to understand your benefit entitlements.

You can also read:

- MilitarySuper PDS
- About to Leave the ADF? factsheet
- Invalidity Benefits factsheet
- Superannuation Contributions Surcharge factsheet

All these publications are available on the CSC website at csc.gov.au

A financial advisor may also be able to assist.

Contact us

If you have any further questions about your benefit entitlements or investment options you can contact us in the following ways:

Mail

GPO Box 2252 Internet csc.gov.au

Phone

1300 006 727 Email

for the cost of a local call members@enq.militarysuper.gov.au

Fax

(02) 6275 7010

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

Post your completed original application and attachments to:

MilitarySuper GPO Box 2252 Canberra ACT 2601 Australia

OR

You can fax or email documents to formsandapplications@csc.gov.au





Application for **Invalid**ity Benefits

Form start

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



About yourself

1.	Service	Navy	Army	RAAF
2.	Service number			
	PMKEYS Number			
3.	Salutation	Mr Mrs	Ms Miss	Other
	Surname			
	Given name(s)			
4.	Former surname (if applicable)			
5.	Date of birth	D D M M Y	Y Y Y	
6.	Contact details before transition	AFTER HOURS MOBILE NUMBER		
		EMAIL ADDRESS		



Section A continued on next page

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POSTAL ADDRESS



9.	Transition centre	
	Phone number	
10.	Date of Medical transition	D D M M Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y
11.	Substantive rank	
		*If your transition date changes please notify MilitarySuper ASAP.
	Superannua	tion Contributions Surcharge
12.	rollover to another fund, will be If you have a Superannuation Co The default provisions are that it	when a benefit becomes payable, whether in cash or by transfer/deducted from the MilitarySuper benefit payable. ntributions Surcharge debt, you will need to elect how it will be paid. can be taken from the Employer Benefit after conversion to pension, en as a total lump sum, the debt will be taken from the before tax
	How do you elect to have a Sup	erannuation Contributions Surcharge debt deducted?
		Default provisions to apply
		From the Employer Lump Sum Benefit before it is converted to pension, From your Ancillary Benefit, if any
		or From the Member Benefit before it is paid as a lump sum
D	Pension pay	ment details (if applicable)
13.		lass B, your Employer Benefit will be paid as a pension. Give details of o. The account must be in Australia.
	Type of financial institution	Savings bank Building society Trading bank Credit union
	Name of institution	
	Branch location	

Please complete the ${\bf Tax\ File\ Number\ Declaration}.$

Branch (BSB) number

Account in name(s) of (must

Account number

include your name)

Member Benefit options

vii) Low income contributions

14.	Payment options Rollover al Rollover pi	re 1 July 1999 compor	nent and preserve the balar ent as cash and preserve th	
		lete Question 17 and / or 1	ent as cash and rollover the 8 if you elect to rollover or take so	
15.	When you claim your MilitarySuper Benefit you non-preserved (ie pre 1 July 1999) Member Bene		e following options for you	r
	same prop OR Option 2 Apply all ye	ortions as existed in y	payment of your pre 1 July sour total Member Benefit) component against the pay	
B	Ancillary Benefit o	ptions		
16.	Do not clai	tisfied the Condition ad preservation age an - Fill out the table be m – Go to Part G	of Release.	Part G
	Ancillary benefit type		Cash out (only available if you have satisfied the Condition of Release)	Roll over any time
	All types	100% only		
			О	R
	i) Additional personal contributions	100% only		
	ii) Salary sacrifice	100% only		
	iii) Transfer amounts	100% only		
	iv) Spouse contributions	100% only		
	v) Co-contributions	100% only		
	vi) Super guarantee	100% only		

100% only

Roll over

17. If you are rolling over any of your Member or Ancillary Benefit:

You may roll over to a maximum of two rollover funds. Unless you state otherwise, your Member and Ancillary Benefit will be rolled over to the same fund/s.

Payments will be made directly to the nominated rollover fund(s). A copy of the Rollover Benefits Statement will also be included with your benefit payment letter and sent to your nominated address.

Write the amount for each institution, except write 'BALANCE' for the last (or only) fund.



18.

Important: Please ensure your nominated rollover account(s) is active and able to receive deposits from other superannuation funds. Failure to do so will result in the payment being returned to our office.

Name of first																						
rollover fund																						
Postal address	POST	TAL A	DDRES	SS																		
of fund																						
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as your Member Client																						
Identifier) for fund																						
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as above for the second fund.																						
Refer to Rollover fund nominati	ons i	nstr	ucti	ons	on p	oage	2.															
Cash																						
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include your name)		_	-	-		-	-			-	-	-	-		-	-		-				



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.

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:

- 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:

 - 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.

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

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

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 S





- 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).

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
- 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.

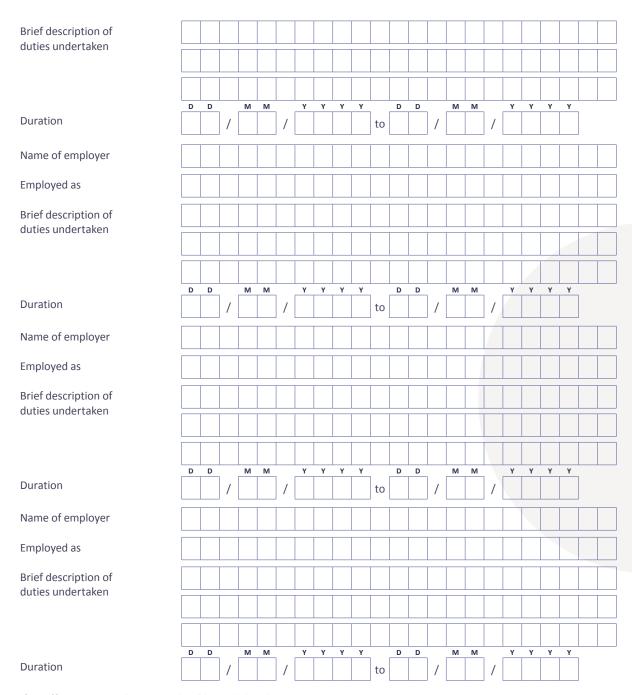
*Don't send original documents.

If your documents are incompatible with DVS, don't forget to provide



Pre-service skills, qualifications and experience

20.	What grade/level of schooling did you complete before	
	leaving school?	D D M M Y Y Y
	Date of leaving school	
21.	What was the highest/last public examination you passed at school?	Y Y Y Y Year of completion
22.	What tertiary study or technical training have you completed?	Y Y Y Y Year of completion
		Year of completion
23.	What professional, technical or trade qualifications did you gain?	
	you gain:	
24.	What tertiary study or technical training have you partially completed?	
	Year(s) of study	Y Y Y Y Y
	If insufficient space please atta	ch additional details.
	-	vice employment history
25.	Include self-employment and pe	eriods of unemployment
	Name of employer	
	Employed as	
	Brief description of duties undertaken	
	Duration	D D M M Y Y Y Y T TO D D / M M / Y Y Y Y
	Name of employer	
	Employed as	



If insufficient space please attach additional details.



In-service education and training

26.	What education or trade course have you completed?	
	Year(s) of completion	Y Y Y Y
27.	What professional, technical or trade qualifications did you gain?	

What education or trade course have you partially completed?														
Year(s) of study	Y	Υ	Υ	Y										

If insufficient space please attach additional details or attach information obtained from service records.



In service employment history

29.	Employed as																							
	Brief description of duties undertaken																							
																						=		=
	Duration	D	D	/	M	M	/	Υ	Υ	Υ	Υ	to	D	D	/	M	M	/	Υ	Y	Υ	Y		
	Employed as																							
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If insufficient space please attach additional details or attach information obtained from service records.



30. Under the *Superannuation Industry (Supervision) Act 1993*, we are authorised to collect your Tax File Number (TFN), which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. We may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing that your TFN not be disclosed to any other superannuation provider.

We are required to validate your TFN with the ATO's records to confirm the TFN provided is yours and is correct. Your TFN can be validated using the SuperTICK validation service at any time during your MilitarySuper membership and must be validated before your benefit can be rolled over to another fund. If you do not provide your TFN, the processing of your benefit payment may be delayed.

It is not an offence not to quote your TFN. However, giving us your TFN will have the following advantages (which may not otherwise apply):

- we will be able to accept all types of contributions (subject to scheme rules)
- the tax on contributions to your superannuation account/s will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

If you have already provided your TFN to us, you are under no obligation to provide it again in this application.

Your Tax File Number	_	-	
	Your TFN remai	ins confidential	
Can MilitarySuper give your TFN	to the Rollover	Fund(s)/RSA(s) n	ominated above?
	Yes	No	



Document checklist

31.	If applicable, when you lodge this form, please provide the following documents:
	A copy of the Defence Force's acceptance of long service leave credit — If you joined the Defence Force before 1 July 1983, your eligible service period (for PAYE taxation purposes in respect of any lump sum payments) may include periods of employment recognised for long service leave purposes. If such a period is not already included in your total period of effective service, you should provide details of the periods if you wish to have them included in your eligible service period. If you claim an additional period, you must attach to this application a copy of the Defence Force's acceptance of the periods for long service leave purposes.
	A Marriage Certificate or Registered Relationship Certificate.
	Medicare levy variation declaration (if you are claiming a Medicare levy exemption against a pension entitlement) – the form is available from your local Taxation Office.
	Print from Department of Defence showing In-service Education Training (you must provide this document if possible).
	Print from Department of Defence showing In-service Employment History (you must provide this document if possible).
	Certified copies of documents requested to prove your identity



Member declaration

32.

I declare that:

- 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
- I have been advised to read the MilitarySuper PDS before completing this application form
- I understand the options available for my benefit entitlement.

I also declare in relation to my Tax File Number (TFN) that:

- I have read and understood the information set out in Part L I understand that supplying my TFN is optional and that if I have not provided my TFN, tax will be deducted at the highest marginal rate
- the TFN I have provided is the same number advised to me by the Australian Taxation Office
- the TFN will be provided to a rollover fund unless I advise you not to.

I understand that if I have not provided all the required information, this application may be returned to me for completion and payment may be delayed.

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Sign		D	D	_	M	M		Υ	Υ	Υ	Υ
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	I do not want my contact details passed to										
	independent research firm for the purpose	of par	ticip	ating	5						
	in research on the service provided by Milit	arvSu	her								



Department of Defence – Authority to provide medical and employment records

33.	Service number/ Employee ID														
		GIVEN NAME(S)													
	Ι,														
		SURNAME													
		RESIDENTIAL ADDRESS													
	of														
		SUBURB		STATE		POSTCODE									
		SUBURD	- i	SIAIE		POSICODE									

authorise the Department of Defence to make available to Commonwealth Superannuation Corporation (CSC) full records relating to my employment, training and medical history (including clinical notes and psychological records) in respect of my Defence Force service and/or advice in respect of such employment, training and medical history.

I also authorise CSC to release copies of the documents obtained under this authority to appropriate medical advisers where such release is necessary for the administration of the *Military Superannuation and Benefits Act 1991*.

I understand that, whilst the information will be subject to standard confidentiality requirements, CSC may be obliged, under the legislative provisions that have application to it, to release the information provided, in whole or in part, to a tribunal or Court.

This authorisation is to remain in force until revoked by me in writing.



The information to be collected on the basis of this authorisation is for a lawful purpose which is necessary for, or directly related to, the administration of *Military Superannuation and Benefits (MSB) Act 1991*.

I understand that any information relating to my medical history collected under this authorisation may be liable to release to other Australian Government agencies in accordance with the disclosure provisions of the Australian Privacy Principles contained in the *Privacy Act 1988*, in particular, to those agencies (such as the Department of Veterans' Affairs) concerned with the provision of financial benefits which may be affected by your entitlements under the *MSB Act 1991*.



34.

DVA/MRCC reference number

(MSB) Act 1991.

Department of Veterans' Affairs (DVA) and/or Military Rehabilitation and Compensation Commission (MRCC) – Authority to provide information

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You have now completed this form.

35. Post your completed original application and attachments to:

> MilitarySuper **GPO Box 2252** Canberra ACT 2601 **Australia**

OR

You can fax or email documents to formsandapplications@csc.gov.au

Privacy

We're collecting the information on this form for the following reasons:

- to confirm your identity
- to assess your eligibility for payment/rollover of the benefit
- to record up to date details relating to your spouse (if applicable) for future benefit eligibility
- to pay your benefit or to roll it over
- to contact you.

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via csc.gov.au or by contacting us on 1300 006 727, for the purpose of managing your super. This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.















