



Application for an associate pension*

by the former spouse of a DFRDB/DFRB pensioner

Important information about this form

Who should use this form?

You should complete this form if your former spouse is receiving a pension from Defence Force Retirement and Death Benefits Scheme (DFRDB) or Defence Force Retirement Benefits Scheme (DFRB) and you have been granted a portion of that pension under a Family Law payment split.

When is the pension paid?

The pension becomes payable on the first available pension payday after the later of the operative time or DFRDB receipt of the Family Law Court Order or Superannuation Agreement. The pension is calculated on the basis of a 14 day fortnight.

Who pays the pension?

Payment is made by Commonwealth Superannuation Corporation (CSC).

How is the pension paid?

The pension is paid by direct credit to an approved financial institution (bank, building society or credit union) of your choice. If at any time, after the pension has commenced, you wish to change the institution to which pension is being credited, you only need contact DFRDB by calling **1300 001 877**.

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 RSA's 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 send all rollover payments direct 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 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 may 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.



Defence Force
Retirement & Death
Benefits Scheme

➡ About this form continued on next page

Tax File Number requirements

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 pensions if a person does not provide a Tax File Number (TFN).

If you have not been issued a TFN you should lodge an application/enquiry form with the Australian Taxation Office (ATO). Forms are available at all tax offices. You must provide proof of identity at the time you lodge the form.

Tax File Number declaration form

The information you provide on this form will determine how much tax is deducted from your pension. Please note you can only claim the tax-free threshold against one source of income.

Other deductions

Facilities are not available for deductions other than income tax to be made from your pension.

Pension increases

Your pension will be subject to bi-annual adjustment. Your pension will be subject to an indexation adjustment on the first pension payday in January and July each year. The increase is payable on the first pension payday in January and July each year.

When does the pension cease?

Your pension is payable until your death. No reversionary benefits are payable.

How to complete this application

Additional information regarding important or optional questions is provided below.

About yourself:

This section provides necessary personal details to enable benefits to be paid to you. It is important that you keep us informed of any changes of address, bank account details or name.

Payment details:

This section lets you tell us where to pay your pension. The account must be held in your name only or jointly between yourself and one other person.

For more information

The DFRDB is administered by CSC. If you need more information or help to complete this application please:

Email
pensions@dfldb.gov.au

Phone
1300 001 877
for the cost of a local call

Fax
(02) 6275 7010

Website
csc.gov.au

Mail
GPO Box 2252
Canberra ACT 2601

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::

DFRDB
GPO Box 2252
Canberra ACT 2601
Australia



Application for an associate pension*

by the former spouse of
a DFRDB/DFRB pensioner

Form start

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

A

About yourself

1.	Service number/employee ID	<input type="text"/>																				
2.	Salutation	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="text"/>																				
	Surname	<input type="text"/>																				
	Given name(s)	<input type="text"/>																				
3.	Address	<p>POSTAL ADDRESS</p> <input type="text"/> <input type="text"/> <p>SUBURB STATE POSTCODE</p> <input type="text"/> <p>RESIDENTIAL ADDRESS</p> <input type="text"/> <input type="text"/> <p>SUBURB STATE POSTCODE</p> <input type="text"/>																				
4.	Date of birth	<table><tr><td>D</td><td>D</td><td></td><td>M</td><td>M</td><td></td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td>/</td><td><input type="text"/></td><td><input type="text"/></td><td>/</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	D	D		M	M		Y	Y	Y	Y	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D	D		M	M		Y	Y	Y	Y													
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5.	Contact details	<p>BUSINESS HOURS</p> <input type="text"/> <p>AFTER HOURS</p> <input type="text"/> <p>MOBILE NUMBER</p> <input type="text"/>																				



Defence Force
Retirement & Death
Benefits Scheme

➔ Section A continued on next page

[illegible]

B Method of payment

[illegible][illegible][illegible]

Branch (BSB) number

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Account number								
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Commutation of small associate pension

[illegible][illegible]

Membership number (known as your member client identifier)

ASSOC-PENS 4 of 8

[illegible]

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9.



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](https://www.ag.gov.au) and [dfat.gov.au](https://www.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.**

Tax File Number

10. Providing your TFN is voluntary. If you choose not to provide it you will not commit an offence. The consequences of not providing your TFN are:

- tax will be deducted at a higher rate from any eligible termination payment we make to you, unless you provide your TFN. Any additional tax may be reclaimed through the income tax assessment process.
- you may have become liable to pay surcharge which, had you provided your TFN, you would not have been required to pay. Due to a change in surcharge laws, this only applies to surchargeable contributions (your employer productivity contributions together with those notionally paid by your employer in a financial year) made prior to 1 July 2005. In some circumstances you would be able to reclaim this surcharge deduction from the ATO.
- the trustee of another superannuation scheme or RSA provider holding your benefits now or in the future may not be able to locate, amalgamate or identify your benefits in order to pay you.

Note that the consequences may change in the future as a result of legislative change.

DFRDB is authorised to collect your TFN under the provisions of the *Superannuation Industry (Supervision) Act 1993*. We will treat your TFN as confidential and will only use it for legal purposes, which include:

- disclosing it to the trustee of an eligible superannuation entity, regulated exempt public sector superannuation scheme or RSA provider to which your benefits are transferred in the future.
- finding or identifying your superannuation benefits where other information is insufficient.
- calculating tax on your benefits.
- providing information to the Commissioner for Taxation.

Otherwise, your TFN will be treated as confidential.

Note that the lawful purposes may change in the future as a result of legislative change.

Note: If you have already provided your TFN to us, you are under no obligation to provide it again in this application. 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 using the SuperTICK validation service. If you do not provide your TFN, the processing of your benefit payment may be delayed.

Your Tax File Number

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Your Tax File Number remains confidential

Document list

11. If you have included attachments with this application, please tick the appropriate box(es) to ensure the attachments are properly recorded.

- ☐ Tax File Number declaration form
- ☐ Medicare levy variation declaration
- ☐ Other (please specify below)

[illegible]



Member declaration

12.

I declare that:

- I understand the options available for my benefit entitlement
- the information I have supplied is complete and correct.
- I also declare in relation to my Tax File Number (TFN) that:
 - I have read and understood the information set out in **Part E**; 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 (ATO) and
 - 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.



Sign

SIGNATURE

Date signed

D	D	/	M	M	/	Y	Y	Y	Y
<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

☐

I do not want my contact details passed to an independent firm commissioned for the purpose of participating in research on the service provided by CSC.



Lodgement

13.

You have now completed this form.

Send your completed application and attachments to::

DFRDB
GPO Box 2252
Canberra ACT 2601
Australia

Privacy

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 001 877**, 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.

End Form



Need assistance?
Call us on the phone
numbers below



Email
pensions@dfrdb.gov.au



Phone
1300 001 877



Fax
(02) 6275 7010



Post
DFRDB
GPO Box 2252
Canberra ACT 2601



Web
csc.gov.au



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+61 2 6275 7000