



Associate deferred benefit invalidity retirement

Benefit application

1. Explanatory notes

2. Form

Important information about this form

Before you complete this benefit application form, please read the **CSS Product Disclosure Statement (PDS)**. This form and the **Explanatory notes** are for persons claiming a CSS associate deferred benefit on invalidity grounds. To be eligible to claim on invalidity grounds, Commonwealth Superannuation Corporation (CSC) must have approved the release of the benefit on the grounds that you are totally and permanently incapacitated.

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 the completed form to us at the address shown on page 10; if you'd like to confirm that we have received your application, call **1300 289 548**
- after we have paid your benefit, it is very important that 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.

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?

- Visit our website at csc.gov.au
- Contact us at the details shown at the end of this form.
- Obtain personal financial advice for your needs and goals (see overleaf).

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

Please post your completed, signed application form and attached documents to:

CSS
GPO Box 2252
Canberra ACT 2601
AUSTRALIA



Commonwealth
Superannuation
Scheme

1. Explanatory notes start

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.

Benefit option

An associate CSS deferred benefit is paid out as a standard CPI-indexed pension and a lump sum. You can take the lump sum as cash or roll it over to another fund.

Section B – Identification requirements

To guard against fraud, money laundering, 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 a 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 – 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 must be yours.

Section D – 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 must be yours.

Once an amount has been paid to you or deposited in your bank account, you cannot subsequently roll it over.

Section E – Rollover details

You need to check that you can rollover your benefit to a complying super fund, rollover fund, retirement savings account (RSA), or use it to purchase an annuity.

Rollover fund nominations

You can nominate up to two rollover funds or RSAs to receive all or part of your lump sum benefit.

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

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

While you may request that 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.



Notes continued on next page

Section F – Taxation matters

Your Tax File Number (TFN)

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.

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 that there are consequences for not supplying your TFN to a fund.

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.

Section G – Declaration

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

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 000 277**, 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 of
explanatory
notes

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been intentionally
left blank.

☐ No ☐ Yes[illegible]

B Identification requirements

Verifying your documents

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

Certifying your documents

*** IMPORTANT:** The certification must include the name, signature, qualification and registration number of the certifying authority (if applicable), and the date of the certification.

- 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.

 Section B 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.**

Account details for your pension payment

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I would like my lump sum cash payment to be comprised of either (please choose one):

			%
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 a gross dollar amount of

\$							
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☐ the benefit balance after any rollovers.

[illegible][illegible]

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I would like to rollover: (please choose one)

- OR**

- OR**

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| \$ | | | | | | | | |
|----|--|--|--|--|--|--|--|--|

OR

- | | | | |
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| | | | % |
|--|--|--|---|

OR

- ☐
- my entire lump sum benefit

Name of fund or RSA

[illegible]

ABN of fund or RSA

[illegible][illegible]

USI of fund or RSA

[illegible][illegible][illegible]

POSTCODE

[illegible]

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Additional details attached?

- ☐
- No



Taxation matters

What is your Tax File Number?

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Tick this box if you don't want us to give your TFN to another super fund.

You should also complete a **Tax File Number declaration** form (available from the ATO) to claim any available tax offsets and deductions which may apply to your pension. 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.



Declaration

I declare that:

- I have been advised to read the **CSS PDS** before completing this form
- 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.



Sign

SIGNATURE

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Date signed

D	D	/	M	M	/	Y	Y	Y	Y

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

Member checklist

I have:

- filled in all the sections applicable to me
- attached certified copies of documents requested in **Section B** to prove my identity
- provided bank account details in **Section C** (and **Section D** if applicable)
- attached my completed **Tax File Number declaration**
- signed the declaration in **Section G**.

You have now completed this form.

Please send it to:

CSS
GPO Box 2252
Canberra ACT 2601
AUSTRALIA

End Form



Need assistance?
Call us on the phone
numbers below



Email
members@css.gov.au



Phone
1300 000 277



Financial Advice
1300 277 777



Post
CSS
GPO Box 2252
Canberra ACT 2601



Web
csc.gov.au



Overseas Callers
+61 2 6275 7000



Fax
(02) 6275 7010