



Application to claim Ancillary Benefit Only

Important information about this form

When to use this form

Use this form if you wish to claim only your Ancillary Benefit. You may claim one or more of your Ancillary Benefit types:

1. Additional Personal Contributions
2. Salary Sacrifice amounts
3. Transfer Amounts
4. 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

Who should use this form?

Use this form if you are:

- a) a member or former member of:
 - Defence Force Retirement and Death Benefits (DFRDB)
 - Military Superannuation and Benefits (MilitarySuper)or
- b) a spouse of a person referred to in paragraph a), for whom spousal contributions have been paid into MilitarySuper.



Important: Do not use this form if you wish to claim both your Ancillary Benefit and any other MilitarySuper benefit. Other MilitarySuper forms should be used.

Before you use this form

Before completing this benefit application form, it is recommended that you read the **Product Disclosure Statement (PDS)** available from CSC website csc.gov.au or by phoning **1300 006 727**.

Completing this form

Complete:

- Part A:** About yourself
- Part B:** Ancillary Benefit options
- Part C:** Surcharge
- Part D:** Tax File Number
- Part E:** Identification requirements
- Part F:** Member declaration

Then lodge with MilitarySuper at the address in **Part G**.



Military
Superannuation &
Benefits Scheme

➡ About this form continued on next page

When can you roll over your Ancillary Benefit?

You may roll over your Ancillary Benefit at any time. The Ancillary Benefit may be cashed out once you have reached your superannuation preservation age (see table below) 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.

You can roll over your Ancillary Benefit to:

- a regulated superannuation fund
- a retirement savings account (RSA)
- an approved deposit fund (ADF).

Date of Birth	Preservation age
Before 1/7/1960	55 years
1/7/1960 – 30/6/1961	56 years
1/7/1961 – 30/6/1962	57 years
1/7/1962 – 30/6/1963	58 years
1/7/1963 – 30/6/1964	59 years
After 30/6/1964	60 years

Rollover fund nominations

If you are choosing to rollover part of your benefit, it must be paid to a complying superannuation fund, rollover fund, 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 the Unique Superannuation Identifier (USI) for the rollover fund or RSA, please include these numbers. If you do not have these numbers, 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, you may elect for it to be deducted from your Ancillary Benefit before payment.

If you are a member of MilitarySuper you may alternatively elect to have the surcharge debt deducted from:

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

If you do not make an election, default provisions will apply. These 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, the debt will be taken from that benefit.

If you are a member of the DFRDB you may alternatively elect to have the surcharge debt deducted from your DFRDB benefit. However, if you make such an election and also elect to commute retirement pay, the debt will be deducted from the commutation lump sum.

If you do not make an election, the surcharge debt will be deducted from your superannuation productivity lump sum benefit.

Please note that if you do not have any other scheme benefit/s the surcharge debt will be deducted from your Ancillary Benefit. Interest will also be applied to the surcharge debt until the debt is fully paid.

Payment

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

Tax file number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct PAYG tax at the Marginal Tax Rate plus 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.

Further information

If you wish, you can seek further information from MilitarySuper on **1300 006 727** on your options and completion of this form. You can also read:

- **MilitarySuper PDS**
- **About to leave ADF?** factsheet
- **Superannuation contributions surcharge** factsheet
- **Tax and lump sums** factsheet

All these publications are available on our website csc.gov.au

A financial advisor may also be able to assist you.

Contacts

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

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
Canberra ACT 2601

Internet

csc.gov.au

Phone

1300 006 727
for the cost of a local call

Email

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 complete original application and attachments to:

MilitarySuper
GPO Box 2252
Canberra ACT 2601
Australia

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been intentionally
left blank.



Application to claim Ancillary Benefit only

A Form Start

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

1.	Service	<input type="checkbox"/> Navy	<input type="checkbox"/> Army	<input type="checkbox"/> RAAF	<input type="checkbox"/> Not in service (spouse only)						
2.	Scheme	<input type="checkbox"/> MilitarySuper	<input type="checkbox"/> DFRDB	<input type="checkbox"/> Not in service (spouse only)							
3.	Service number/employee ID	<input type="text"/>									
4.	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"/>									
		<input type="text"/>									
5.	Former surname (if applicable)	<input type="text"/>									
6.	Date of birth	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7.	Address	POSTAL ADDRESS									
		<input type="text"/>									
		<input type="text"/>									
		SUBURB					STATE		POSTCODE		
		<input type="text"/>					<input type="text"/>		<input type="text"/>		
		RESIDENTIAL ADDRESS									
		<input type="text"/>									
		<input type="text"/>									
		SUBURB					STATE		POSTCODE		
		<input type="text"/>					<input type="text"/>		<input type="text"/>		
8.	Phone numbers	BUSINESS HOURS									
		<input type="text"/>		<input type="text"/>							
		AFTER HOURS									
		<input type="text"/>		<input type="text"/>							
		MOBILE NUMBER									
		<input type="text"/>				<input type="text"/>					



Military Superannuation & Benefits Scheme

➔ Section A continued on next page

Email address

@																							

B

Ancillary Benefit Options

9. Please indicate whether you would like to cash out or roll over any or all of your ancillary types, noting that **you can only cash out if you have satisfied a Condition of Release.**

Ancillary benefit type		Cash out (only available if you have satisfied a Condition of Release)	Roll over any time
All types	100% only	<input type="checkbox"/>	<input type="checkbox"/>
OR			
i) Additional personal contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
ii) Salary sacrifice	100% only	<input type="checkbox"/>	<input type="checkbox"/>
iii) Transfer amounts	100% only	<input type="checkbox"/>	<input type="checkbox"/>
iv) Spouse contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
v) Co-contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>
vi) Super guarantee	100% only	<input type="checkbox"/>	<input type="checkbox"/>
vii) Low income contributions	100% only	<input type="checkbox"/>	<input type="checkbox"/>

Cash only

10. If you are cashing out any of your Ancillary Benefit, give details of the account you want it paid into. The account must be in Australia.

Type of financial institution Savings bank Building society Trading bank Credit Union

Name of financial institution

Branch location

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Branch (BSB) number

				-				
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Account number

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Account held in name(s) of (must include your name)

Rollover

11. You may roll over to a maximum of two rollover funds. 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.



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 rollover fund

Postal address of fund	<table border="1"> <tr><td colspan="24">POSTAL ADDRESS</td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td colspan="12">SUBURB</td><td colspan="3">STATE</td><td colspan="3">POSTCODE</td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>	POSTAL ADDRESS																																																																												SUBURB												STATE			POSTCODE																											
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Ancillary Benefit type	<ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 																																																																																																																							

If you would like to roll over your benefit to more than one fund, please attach the same details as above for the second fund.

C Surcharge

12. If you have a Superannuation Contributions Surcharge debt, do you want it deducted from your Ancillary Benefit?

Yes No

D Tax File Number

13. Under the *Superannuation Industry (Supervision) Act 1993*, we are authorised to collect your 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. 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 and
- 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.

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 will be paid using the SuperTICK validation service. If you do not provide your TFN, the processing of your benefit payment may be delayed.

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

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Your Tax File Number remains confidential.

Can MilitarySuper give your TFN to the Rollover Fund(s)/RSA(s) nominated above?

Yes
 No
 Not applicable (a benefit is not being rolled over)

E

Identification requirements

14. 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*.

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.

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 




-  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.**

F

Declaration

15.

I declare that:

- I have read the **PDS** and I understand the options available for my benefit entitlement.
- I understand the options available for my benefit entitlement.
- 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 also declare in relation to my Tax File Number (TFN) that:

- I have read and understood the information set out in **Part D** – 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 tax 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 completed 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

- 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 MilitarySuper.

G

Lodgement

16.

You have now completed this form.

Post your complete original application and attachments to:

MilitarySuper
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 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.


End Form

Need assistance?
Call us on the phone numbers below

 **Email**
members@enq.militarysuper.gov.au

 **Phone**
1300 006 727

 **Fax**
(02) 6275 7010

 **Post**
MilitarySuper
GPO Box 2252
Canberra ACT 2601

 **Web**
csc.gov.au

 **Overseas Callers**
+61 2 6275 7000