



# Preserved benefit

## Approved invalidity benefit claim

### 1. Explanatory notes

### 2. Form

## Important information about this form

### What this form is for

Before completing this benefit application form, you should read the **PSS Product Disclosure Statement (PDS)** at [csc.gov.au](http://csc.gov.au) or call **1300 000 377**.

The attached benefit application form should be completed by preserved benefit members of Public Sector Superannuation Scheme (PSS) who have **gained approval** to access to their preserved benefits on invalidity grounds.

### 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:

PSS

GPO Box 2252

Canberra ACT 2601

AUSTRALIA

## 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.



Public Sector  
Superannuation  
Scheme

# 1. Explanatory notes start

## Read this first!

These **Explanatory notes** are intended to assist you to complete the attached benefit application form. They are not intended to provide a detailed explanation of your benefit options.

It is suggested that you separate the notes from the form (if joined) so that you can refer to them as you complete the application form.

## Where can you find more information about your benefit entitlements?

There are many publications provided by Commonwealth Superannuation Corporation (CSC) that explain the various benefit options which are available to you. Before completing this benefit application form, you are advised to read the **PSS PDS** at [csc.gov.au](http://csc.gov.au) or call **1300 000 377**.

Factsheets on **Taxation of Lump Sum and Pension Benefits and Preservation of Benefits** are also available from our website at [csc.gov.au](http://csc.gov.au)

Other sources of information include the following:

- Our Customer Information Centre can provide details of your benefit entitlement, explain the benefit options and provide information on the value of your prospective benefits.  
For more information:  
Phone: **1300 000 377**  
Fax: (02) 6275 7010  
Email: [members@pss.gov.au](mailto:members@pss.gov.au)
- It is in your interest to seek professional advice before you make a decision on a benefit.  
A personal advice service is available to you, please refer to the first page of this document.

## Forms you need to complete when claiming your PSS preserved benefit

- the attached Benefit Application form
- if you have chosen to receive all or part of your benefit as a pension and you wish to claim the tax-free threshold and/or any available offsets and deductions against your pension benefit, you should complete a Tax File Number Declaration, obtainable from the Australian Taxation Office (ATO), or designated newsagents that distribute ATO forms.

## The benefit application form

Your accurate completion of the benefit application form allows us to process the application as soon as possible after a claim has been made. Take care when completing this form. If you do not complete the benefit application form correctly, the processing of your benefit will be delayed, or may be paid incorrectly.

## Section A – Personal details

Please complete all the boxes in this section. It enables us to identify you and tells us where we can contact you.

### Relationship details

Details of your relationship status, including same sex or opposite sex de facto relationships, should be provided. You may wish to include a copy of your marriage certificate or registered relationship certificate with your application. This would speed up the process in the event that a spouse's benefit becomes payable.

For the definition of a spouse for death benefits, see the **Death benefits** factsheet at [csc.gov.au](http://csc.gov.au)

### Contact details

The postal address you provide is where all correspondence will be sent.

A contact phone number is also required in case we need to contact you regarding the payment of your benefit.

If you have an email address, inclusion of your current email address will be helpful.



Notes continued on next page

## Section B – Information acknowledgment and preliminary matters affecting your benefit entitlement

### B1 – Information acknowledgment

Please complete this acknowledgement that you have received and understood sufficient information to be able to make an informed choice of how you would like your benefit paid and that you have been advised to read the **PSS PDS** before completing this form.

You are making a formal election under the provisions of the *Superannuation Act 1990*. This election is binding and cannot normally be changed, although CSC may, at its absolute discretion, agree to cancel an election in certain circumstances.

Information sources (including the availability of personal financial advice) are shown at the start of these **Explanatory notes** and it is strongly recommended that you make use of them before proceeding to complete this application form.

You should also note that, if your benefit has been changed and you then change your mind about the benefit payment arrangements, a fee will be charged by us for the re-issuing of the payment.

### B2 – Transfer amounts paid to PSS

The treatment of your transfer value amount paid into PSS is dependent upon when it was paid. A transfer amount paid after 31 December 1995 is treated differently to an amount paid before that date, unless it is related to:

- employment during a period of Leave Without Pay (LWOP) that commenced or
- prior employment that ceased, before 1 January 1996.

#### B2.1 – Transfer value amounts paid to PSS before 1 January 1996

Generally, your transfer amount will be treated as part of your total benefit and will be paid exactly as you have elected. For example:

- if you choose to receive your total benefit as a pension (Option 1), any transfer amount(s) will also be paid as a pension
- if you choose a pension/lump sum combination (Option 2), we will pay your transfer amount(s) in the same ratio of pension to lump sum as the rest of your benefit or
- if you choose a lump sum as your benefit, (Option 3) any transfer amount(s) will be included in the lump sum.

If you want to receive your transfer amount in any other form or combination (ie the main benefit as a pension and transfer amount as a lump sum) you should contact us, before completing the application form attached to this leaflet, to obtain an **SR-Supplement**.

The supplement contains additional elections for transfer amounts and should be completed and attached to the main application form.

#### B2.2 – Transfer value amounts paid to PSS after 31 December 1995

Most transfer amount payments made to PSS after 31 December 1995 are not included in the calculation of your final benefit accrual and remain identified as a separate lump sum, referred to as an accumulated transfer amount. This amount cannot be converted to pension. This amount can either be rolled over or taken in cash.

You may elect to have your accumulated transfer amount transferred to a complying superannuation scheme, rollover fund or deferred annuity scheme.

### B3 – Superannuation contributions surcharge

If you had a surcharge debt advised to you by either the ATO or PSS, and you have not paid off the debt, this debt will be actioned as per your benefit application.

## Section C – Benefit options

This section contains the benefit options that are available to PSS preserved benefit members who are claiming their benefit on approved invalidity grounds. Each option requires a signed election by the applicant for the benefit choice to be valid. Only make one choice, otherwise your benefit application will be invalid and payment will be delayed.

Your benefit may also be subject to deduction of any outstanding superannuation contributions surcharge debt at the date of determination (**see Section B** on surcharge for more information).



## **Option 1 – Pension only, no lump sum (only available if all of your benefit remains preserved in PSS)**

If you want to receive your entire benefit as a pension, select this option.

Any outstanding surcharge debt will be deducted from your pension entitlement through the application of pension reduction factors. The result will be a reduction in the amount of pension payable for the life of the pension.

Your benefits will be paid into the bank account nominated by you in **Section E**. You should also complete and forward a Tax File Number Declaration (see **Section F**).

## **Option 2 – Part pension, refund of member component (only available if all of your benefit remains preserved in PSS)**

If you want to receive your benefit as a combination of pension and lump sum, select this option.

You can take a lump sum of up to your member component and the balance of your PSS benefit is then paid as a pension.

Your benefits will be paid in accordance with your instructions at **Section E**. You should also complete a Tax File Number Declaration (see **Section F**).

## **Option 3 – Lump sum only, no pension**

If you want to take your entire benefit as a lump sum, either in cash or as a rollover to another fund or Retirement Savings Account (RSA), select this option.

Any outstanding surcharge debt will be deducted from the lump sum before it is paid.

The benefit will be paid in accordance with your instructions in **Section E**.

## **Section D – Personal earnings declaration**

If all or part of your benefit is to be paid as a pension and you are receiving personal earnings (ie salary, wages, fees or other amounts for services rendered or work performed, including Directorship fees), you are required to give us particulars of those earnings.

## **Section E – Benefit payment arrangements**

This section allows you to nominate how your lump sum will be paid.

All rollovers must be made to a complying superannuation fund, rollover fund, Retirement Savings Account (RSA), or be used to purchase an annuity.

PSS will not deduct tax from any amount rolled over to a rollover fund, however the untaxed components of the lump sum will be taxed at 15% by the receiving fund. This will alter the nature of the amount from 'untaxed' to 'taxed'.

A higher rate of tax will apply to transfers over \$1.1 million from an untaxed scheme to a taxed scheme.

Taxation legislation provides that, once an amount has been paid to you or deposited in your bank account, it cannot be subsequently rolled over.

## **Lump sum payments**

### **E1 – Lump sum cash payment**

This section allows you to advise what portion of your lump sum (subject to proportioning) is to be paid in cash. You are able to select a gross dollar amount, a percentage of the lump sum amount, or if you have selected a rollover in **Section E**, the balance of the lump sum benefit.

You also have to complete bank account details in **Section E**, to advise us where the cash payment is to be made.

### **E2 – Rollover fund nominations**

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

If you wish to and are eligible to rollover part of your PSS benefit to Commonwealth Superannuation Corporation retirement income (CSCri), the fund details have been prepopulated for you. CSCri is an account-based income stream for those who wish to keep their lump sum benefit invested in government super in retirement.

If you are currently a PSSap Ancillary Member, and wish to and are eligible to join CSCri, your rollover will be paid to your PSSap ancillary membership account first. The Fund details for PSSap have been prepopulated for you.

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).



**Notes continued on next page**

When completing this section you should include sufficient information to enable us to identify the rollover fund or RSA such as the name and Australian Business Number (ABN). You must also provide your Membership Number (known as your member client identifier) and Unique Superannuation Identifier (USI) for the rollover fund or RSA. These details can be obtained from the rollover fund or RSA concerned. Failure to provide these details will result in delays in the payment of your benefit.

#### **Can I request which part of the benefit to rollover first?**

From 1 July 2007, 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.

Therefore, while you may request a certain order of payment or rollover, the payment will be subject to proportioning.

For further information on how your benefit is taxed it is recommended that you read the **Tax and your PSS benefit** factsheet.

### **Bank account details**

Complete this section if you are electing to receive a cash lump sum or a pension as all or part of your benefit.

We can only pay your benefit into an Australian account held in your name. If it's a joint account, one of the names listed must be yours.

## **Section F – Taxation matters**

### **F1 – Start date for taxation purposes**

For taxation purposes, your lump sum benefit is called a Superannuation Lump Sum Payment.

The start date relates to the date your eligible service period (ESP) commenced and is used to calculate the various components of your Superannuation Lump Sum Payment for taxation purposes.

Generally, your ESP is the number of days between the date you commenced your current employment (which may be earlier than the date you joined CSS or PSS), and the date your payment is made. If you were formerly a CSS member who commenced membership before 1 July 1983 and you have a Long Service Leave start date that is earlier than your CSS start date, that earlier start date applies as your ESP start date. Earlier periods of employment for which you paid a transfer value into CSS or PSS are added to your ESP. If this is the case, please fill in the start date of that earlier period of service.

If you do not show a date in this section, we will use the date on which you joined PSS as your start date (unless you transferred from CSS, in which case your CSS start date will be used).

### **F2 – Your 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).

If you have not been issued a TFN you should lodge an Australian Taxation Office Application/Enquiry form with the Australian Taxation Office (ATO). Forms are available at [ato.gov.au](http://ato.gov.au) or all ATO branches. You must provide proof of identity at the time you lodge the form.

### **F3 – Approval to advise your TFN to rollover funds**

We will provide 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.

### **F4 – Tax File Number Declaration**

If you have chosen to receive all or part of your benefit as a pension and you wish to claim the tax free threshold and/or available offsets and deductions against your pension benefit, you should complete the ATO Declaration form and attach it to your benefit application.

**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 – 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.



Notes continued on next page

## What next?

When you have completed your benefit application form, the completed form should be sent to PSS.

**Note:** PSS cannot process the payment of your benefit until after the date you have nominated as the date from which your preserved benefit is to be paid. You may, however, submit your application form before this date. This will allow PSS to check that all documentation and information has been provided.

Remember, the sooner PSS gets your correctly completed application form, the less likelihood there is of any delay in the processing of your benefit.

## 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](http://csc.gov.au) or by contacting us on **1300 000 377**, 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.

## Change of address

If you receive a pension it is very important that you advise us of any change in your postal address or your bank account details. This will enable us to forward information to you each year regarding your benefit.

## Documents you may receive from us

After your benefit is paid you will receive some documents associated with your entitlements.

Depending on which benefit you choose, these documents may include:

- a benefit payment letter, advising you of your benefit entitlement and when your payment will be made
- a copy of the Rollover Benefits Statement, for each rollover nominated in **Section E**, which shows the breakup, for taxation purposes of each rollover you nominate
- a PAYG Payment Summary, in duplicate, for any lump sum cash payment paid to you and
- a PAYG Payment Summary and annual pension increase advice for any pension payments paid to you (which are sent to you in July each year if you are receiving a pension).

Please **DO NOT** lose these documents. They may be required to complete tax returns, lodge rollovers, or apply for Centrelink benefits, etc. It will take some time to issue replacements.

End of  
explanatory  
notes



POSTAL ADDRESS

Postal address grid (two rows of 25 boxes each)

SUBURB

Suburb grid (25 boxes)

STATE

State grid (4 boxes)

POSTCODE

Postcode grid (6 boxes)

Phone number

BUSINESS HOURS

Business hours grid (2 boxes for AM, 10 boxes for PM)

AFTER HOURS

After hours grid (2 boxes for AM, 10 boxes for PM)

MOBILE NUMBER

Mobile number grid (4 boxes for area code, 10 boxes for number)

Would you like to receive an SMS to confirm we have received your application?

No  Yes

Email address

Email address grid (25 boxes)

@ symbol and email domain grid (25 boxes)

Relationship

Married  Single  Defacto

Spouse's name

GIVEN NAME(S)

Given name(s) grid (25 boxes)

Given name(s) grid (25 boxes)

SURNAME

Surname grid (25 boxes)

Spouse's date of birth

Spouse's date of birth grid (DD / MM / YYYY)

Start date of de facto relationship (if applicable)

Start date of de facto relationship grid (DD / MM / YYYY)

# B Information acknowledgement

Benefit processing may be delayed if this acknowledgment is NOT completed.

I have been given enough information to make an informed decision about how I would like my associate preserved benefit to be paid.

I have been given enough information to make an informed decision about how I would like my benefit to be paid and I have been advised to read the **PSS PDS** before completing this form.

I also understand that, by choosing a benefit option in **Section C**, I am making a formal election under the provisions of PSS legislation and this benefit election cannot be changed **except in certain circumstances approved by Commonwealth Superannuation Corporation.**



SIGNATURE box

Date signed

Date signed grid (DD / MM / YYYY)

If you need more information, or would like to discuss the options you have, please contact our Customer Information Centre via telephone **1300 000 377**, facsimile **(02) 6272 9613**, or email **members@pss.gov.au**





# Benefit options

Please ensure that only ONE benefit option is completed.

## OPTION 1.

Pension only, no lump sum (only available if all of your benefit remains preserved in PSS)

I,

FULL NAME

Grid for full name (2 rows, 20 columns each)

whose Reference number (AGS) is

Grid for Reference number (10 columns)

I elect to take my benefit as a pension.



SIGNATURE box

Date signed

Date grid: DD / MM / YYYY

You have now completed this section. You must now go to **Section D**.

## OPTION 2.

Part pension and part lump sum (subject to proportioning) (only available if all of your benefit remains preserved in PSS)

I,

FULL NAME

Grid for full name (2 rows, 20 columns each)

whose Reference number (AGS) is

Grid for Reference number (10 columns)

I elect to take my benefit as a pension

I wish to be paid a lump sum of my accumulated member contributions, with the balance of my benefit to be paid as pension

OR

I wish to be paid a lesser lump sum of

\$ [grid] (gross)

with the balance to be paid as a pension.



SIGNATURE box

Date signed

Date grid: DD / MM / YYYY

## Surcharge repayment

If you have an outstanding superannuation contributions surcharge debt, the debt can be deducted from either your pension or your lump sum. (Refer to **Section B** of the **Explanatory notes** for further details.)

Please select one of the following repayment options:

deduct the surcharge deduction amount from my pension (permanent reduction)

OR

deduct the surcharge deduction amount from my lump sum.



SIGNATURE box

Date signed

Date grid: DD / MM / YYYY

You have now completed this section. You must now go to **Section D**.

**Section C continued on next page**



OR

accumulated transfer amount only

OR

member component only

OR

the benefit balance after any rollovers. This will be the balance of your associate preserved benefit after you elect to roll over any part your lump sum.

## B. Rollover fund or retirement savings account (including rollovers to account-based retirement income streams)

If you wish to and are eligible to rollover to Commonwealth Superannuation Corporation retirement income (CSCri) please complete **B1** below.

If you wish to rollover to any other rollover fund or retirement savings account (RSA), please complete **B2**.

### B1. Rollover to CSCri

Are you a PSSap Ancillary Member?

Yes

No

#### If Yes

If you are a PSSap Ancillary Member your rollover will be paid into your PSSap ancillary account prior to starting the retirement income stream from CSCri.

You must also complete the form **Apply for CSC retirement income for PSSap members** available on our website at [csc.gov.au](http://csc.gov.au) and send your completed form to CSCri (see address below) when you provide your **PSS Preserved benefit approved invalidity benefit claim** form to your employer.

PSSap member number

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Name of fund

**Public Sector Superannuation accumulation plan**

ABN of fund

**65 127 917 725**

Postal address of fund

**PSSap Locked Bag 9300 Wollongong NSW 2500**

Unique Superannuation Identifier (USI) of fund

**65127917725001**

#### If No

If you are not a PSSap Ancillary Member, your rollover will be paid directly to CSCri.

You must also complete the form **Apply for CSC retirement income for CSS and PSS members** available on our website at [csc.gov.au](http://csc.gov.au) and send your completed form to CSCri (see address below) when you provide your **PSS Preserved benefit approved invalidity benefit claim** form to your employer.

Name of fund

**Commonwealth Superannuation Corporation retirement income (part of Public Sector Superannuation accumulation plan)**

ABN of fund

**65 127 917 725**

Unique Superannuation Identifier (USI) of fund

**65127917725002**

Postal address of fund

**CSCri Locked Bag 8840 Wollongong NSW 2500**

The amount you would like to be paid to this Fund is:

a gross dollar amount of  
\$

**OR**

a percentage of my lump sum  
 %

**OR**

the balance of my lump sum benefit.

If you have specific instructions relating to which components of your benefit you would like to take as a cash payment or rollover (subject to proportioning), please attach these details separately.

Additional details attached?

Yes  No

## B2. Rollover to other fund or retirement savings account (RSA)

Name of fund or RSA

ABN of fund or RSA

**AUSTRALIAN BUSINESS NUMBER**

Membership number (known as Member Client Identifier) for fund or RSA

**OR**

USI of fund or RSA

**USI = UNIQUE SUPERANNUATION IDENTIFIER**

Postal address of fund

**SUBURB**

**STATE**

**POSTCODE**

The amount you would like to be paid to this Rollover fund or RSA is:

a gross dollar amount of  
\$

**OR**

a percentage of my lump sum  
 %

**OR**

the balance of my lump sum benefit.

If you have specific instructions relating to which components of your benefit you would like to take as a cash payment or rollover (subject to proportioning), please attach these details separately.

Additional details attached?

Yes  No

## C. Bank account details

Name of institution

Name of account holder

Branch location

Branch (BSB) number  -

Account number

**Note:** If the BSB or account number you provide is incorrect the payment will not be accepted by your financial institution. If you have any doubts what your correct BSB or account number is, you should confirm these details with your financial institution before including them in this form.

The information I have supplied is true and correct.

 **Sign**

SIGNATURE

Date signed

/   /

You have now completed this section. You must now go to **Section F**, to tell us your taxation information.

# F Taxation matters

## A. Tax File Number (TFN)

Tax File Number

PSS, acting on behalf of Commonwealth Superannuation Corporation, is authorised to collect your Tax File Number (TFN) under the provisions of the *Superannuation Industry (Supervision) Act 1993*. The legal uses of your TFN are summarised in **Section F** of the **Explanatory notes**.



**Important:** If you have already provided your TFN to us you are under no obligation to provide it again when making an application for benefits. However, if your TFN is NOT recorded by us, payment of your benefits may be delayed.

Check this box if you permit us to pass your TFN on to the Rollover Fund(s)/RSA(s) nominated **Section E** above.

## B. Tax File Number Declaration

Pension recipients should also obtain and complete a Tax File Number Declaration form (obtainable from the ATO or your Personnel Section) in order to claim any available tax offsets and deductions.

**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.



# 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:

- 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](http://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](http://ag.gov.au) and [dfat.gov.au](http://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.**



# Member checklist

I have

- read all the **Explanatory notes**, received a benefit estimate, and any other information you require to make an informed choice
- filled in all applicable sections
- signed the Information acknowledgment at **Section B**
- signed an election option in **Section C**
- completed any rollover details in **Section E**
- completed the bank account details in **Section E**
- provided my TFN in **Section F**
- attached my completed Tax File Number Declaration form (for pension recipients only)?
- attached certified copies of documents request at **Section G** to prove your identity?

## You have now completed this form.

Please return it, with any attachments, to:

**PSS**  
**GPO Box 2252**  
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