

Application for Estate Benefits on Death of an Associate

Who should use this form?

This form should be completed if you are claiming a benefit in respect of a deceased Associate of the Military Superannuation and Benefits Scheme (MilitarySuper) who is not survived by an eligible spouse, child or children.

Associate A and Associate B benefits

The deceased's benefit may consist of one or both of the following:

Associate A benefit—is a taxed benefit that is held for a person as units in one or more Investment Divisions in the MilitarySuper Fund.

Associate B benefit—is an untaxed benefit that is indexed annually at the long term bond rate.

Payment

Lump sum payments are normally paid within 15 working days after the date the Delegate approves an application.

There is no pension option available.

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

For more information

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

You can also read the Product Disclosure Statement (PDS) for the Military Superannuation and Benefits Scheme available on the MilitarySuper website www.militarysuper.gov.au

A Financial Advisor may also be able to assist.

Privacy

The MilitarySuper Board and our administrator, ComSuper, are committed to protecting any information you give us. Your information will be used to send you news about your super and to contact you if we need to in the future.

Your information will not be used for any other purpose or disclosed to another party, unless:

- you authorise us to do so
- it is required by Law
- it is to the market research provider who may, on our behalf, invite you to participate in a survey about our service (they are required to protect this information from disclosure to another party). If you do not want your contact details passed to the provider, please put a cross in the box at Part I on page 8 of the benefit application form.

Disclaimer

IT IS IMPORTANT YOU KNOW - THIS DOCUMENT CONTAINS GENERAL ADVICE OR INFORMATION ONLY

Any financial product advice in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Therefore, before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation or needs. You may wish to do so with or without the assistance of a licensed financial advisor.

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Application for Estate Benefits on Death of an Associate

PART A

About the deceased

1. Service Navy Army RAAF
 Service number/Employee ID
2. Title Mr Mrs Ms Miss Other
 Surname
 Given name(s)
3. Former surname (if applicable)
4. Date of birth / /
5. Date of death / /

Please attach a certified copy of the death certificate or forward later when available.

PART B

Your details

6. Title Mr Mrs Ms Miss Other
7. Surname
8. Given name(s)
9. Date of birth / /
10. Postal address

 SUBURB STATE POST CODE
- Residential address

 SUBURB STATE POST CODE

Part B continued on next page

11. Was the deceased married, or living with a person of the opposite sex?

- Yes
- No

Person's name

Person's address

SUBURB

STATE

POST CODE

12. Did the deceased have any children under age 25?

- Yes
- No

Child's name

Guardian's name

Child's/ Guardian's address

SUBURB

STATE

POST CODE

If there is more than 1 child/guardian, please attach another sheet with these details.

PART C

About the person handling the affairs of the estate

13. Name

14. Firm name (if applicable)

15. Postal address

SUBURB

STATE

POST CODE

16. Contact details

BUSINESS HOURS

AFTER HOURS

MOBILE NUMBER

FAX NUMBER

A	B	C
Driver's licence or permit issued by State or Territory or foreign government	Birth Certificate or Birth Extract, issued by an Australian or foreign Government (either in English or accompanied by English translation prepared by an accredited translator)	Copy of a rates bill with the same address and name as on the application
Passport (current or expired by less than two years)	Australian Citizenship certificate	Copy of an electricity or gas bill with the same address and name as on the application
An identification or proof of age card issued by a State or Territory, containing a photograph	Citizenship certificate issued by a foreign country (either in English or accompanied by an English translation prepared by an accredited translator)	Copy of a tax return letter from the ATO with the same address and name as on the application
A national identity card, containing a photograph, issued by a foreign government (either in English or accompanied by an English translation prepared by an accredited translator)	Pension or other social security/ DVA benefit card	A letter from Centrelink or DVA with the same address and name as on the application
	ADF Discharge papers or an ADF ID card	For a person under the age of 18, a letter from a school principal, within three months of application, stating the name of the student, residential address and period of time the student attended the school

All copies of documents provided to MilitarySuper must be certified as true and correct copies of the original by one of the following:

- a legal practitioner enrolled on the roll of a supreme court or the high court of Australia
- a judge or magistrate of a court
- a chief executive officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Justice of the Peace (JP)
- a notary public
- a police officer
- an agent or permanent employee of the Australian Postal Corporation in an office supplying postal services to the public
- an Australian consular officer or an Australian diplomatic officer
- a finance company officer with two or more years of continuous service with one or more Finance Companies
- a person employed by or an authorised representative of the holder of a financial services licence with two or more continuous years of service
- a member of the Institute of Chartered Accountants (ICA), Certified Practising Accountants (CPA Australia) or National Institute of Chartered Accountants (NIA) with two or more years of continuous membership

The person certifying your documentation must confirm in writing that you are the valid holder of the ID that you are presenting and that any copies are true copies of the original.

The certification must include the name, address, occupation, telephone number and registration number (if applicable) of the certifying authority.

If you are providing copies of bills or statements, you should black out any personal financial information or details of transactions in order to protect your privacy. Copies of identification provided will be stored electronically in a secure environment. The paper copies will be securely destroyed. All copies will only be used for the purpose of confirming your identity.

List the documents you have attached to prove your identity:

1. _____
2. _____
3. _____

PART G**Attachments**

24. If applicable, when you lodge this form, please provide the following documents:

- A Death certificate (if available, if not, forward later)
- A Will
- A Probate Document or Letters of Administration
- Certified copies of documents requested to prove your identity
- Other (please specify below)

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PART H**Declaration**

25. I declare that the information I have supplied is complete and correct.

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.

Your signature

SIGNATURE

Date signed

D	D	/	M	M	/	Y	Y	Y	Y

PART I**Privacy**

26.

- 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 ComSuper.

PART J**Lodgement**

27. Send your completed application and attachments to:

MilitarySuper
PO Box 22
BELCONNEN ACT 2616

END FORM

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Attachment reference Persons before whom documents may be certified

1. A person who is currently licensed or registered under a law to practice in one of the following occupations:

Occupations

- Chiropractor
 - Dentist
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trade marks attorney
 - Veterinary surgeon
 - Legal Practitioner
2. A person who is enrolled on the roll of the Supreme Court of a State or Territory or the High Court of Australia, as a legal practitioner (however described)
 3. **A person who is in the following list**
 - Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
 - Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
 - Authorised representative or officer of an Australian Financial Services licensee, having 2 or more years of continuous service with one or more licensee
 - Bailiff
 - Bank officer with 2 or more continuous years of service
 - Building society officer with 2 or more years of continuous service
 - Chief executive officer of a Commonwealth court
 - Clerk of a court
 - Commissioner for Affidavits
 - Commissioner for Declarations
 - Credit union officer with 2 or more years of continuous service
 - Employee of the Australian Trade Commission who is:
 - (a) in a country or place outside Australia; and
 - (b) authorised under paragraph 3 (d) of the *Consular Fees Act 1955*; and
 - (c) exercising his or her function in that place
 - Employee of the Commonwealth who is:
 - (a) in a country or place outside Australia; and
 - (b) authorised under paragraph 3 (c) of the *Consular Fees Act 1955*; and
 - (c) exercising his or her function in that place
 - Fellow of the National Tax Accountants' Association
 - Finance company officer with 2 or more years of continuous service
 - Statutory Office holder not otherwise listed

Attachment reference (continued)

- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - (a) an officer; or
 - (b) a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with 2 or more years of continuous service; or
 - (c) a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Member of:
 - (a) the Parliament of the Commonwealth; or
 - (b) the Parliament of a State; or
 - (c) a Territory legislature; or
 - (d) a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- Notary public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority; or
 - (c) a local government authority;
 with 2 or more years of continuous service who is not specified in another item in this Part
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy