

Application for an Associate Pension* by the former spouse of a MilitarySuper pensioner

Before you use this form

Before completing this benefit application form, it is recommended that you read the Product Disclosure Statement (PDS) for the MSB Scheme, available on the MilitarySuper website www.militarysuper.gov.au or by phoning **1300 006 727**.

Who should use this form?

You should complete this form if your former spouse is receiving a pension from MilitarySuper and you have been granted a portion of that pension under a Family Law payment split.

This form should not be used if you have your own account with MilitarySuper as a result of a Family Law split which occurred while your former spouse was still a contributing Member of MilitarySuper. The appropriate form to use in these circumstances is the Age Retirement for Associate Members form.

When is the pension paid?

The pension becomes payable on the first available pension payday after the later of the operative time or ComSuper 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 ComSuper on behalf of the MilitarySuper Board.

How is the pension paid?

The pension is paid by direct credit to an approved financial institution (bank, building society, 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 ComSuper by telephoning **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, 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 rollover 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 make all rollover cheques payable to your nominated rollover fund(s) and send them directly to your nominated 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. Providing the Superannuation fund number (SFN) is optional. If you have a membership number for the rollover fund or RSA, please include this number. If you do not have a membership number, please list a Superannuation Product Identification Number (SPIN). You can get these details 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.

Tax File Number requirements

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, ComSuper is 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 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.

* Under the scheme you are called an Associate and your pension is called an Associate Pension.

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.

Medicare Levy Variation Declaration

If you are claiming a Medicare Levy exemption against a pension entitlement, you should include a Medicare Levy Variation Declaration form, available from your local Taxation Office, with this application.

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 in line with upward movements in the Consumer Price Index (March to September and September to March periods). The increase is payable on the first pension payday in January and July each year. Please contact ComSuper prior to claiming your benefit to obtain the current level of commutation.

When does the pension cease?

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

How to complete this application

Most questions are self-explanatory. However additional information regarding important or optional questions is provided below.

About yourself:

This segment 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 or name.

Payment details:

This segment 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.

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 an independent firm 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 on please put a cross in the box at **Question 15A**.

Contact

MilitarySuper is administered by ComSuper. If you need more information or help to complete this application please:

Visit

Unit 4 Cameron Offices
Chandler Street
Belconnen ACT 2617

Mail

PO Box 22
Belconnen ACT 2616

Email

members@enq.militarysuper.gov.au

Phone for the
cost of a local call
MSBS: 1300 006 727

Fax

(02) 6272 9616

Internet

www.militarysuper.gov.au

When contacting ComSuper, please remember to quote your reference number.

You do not need to return this page with your form.

DISCLAIMER 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.

Application for an Associate Pension* by the former spouse of a MilitarySuper pensioner

Hints for using this form:

- read the Explanatory Notes and each section of the form carefully before filling it in
- use capital letters and a black pen, and tick boxes for your answers as appropriate
- ensure the application is signed

PART A

About yourself

1. Service Navy Army RAAF

2. Service number/Employee ID

3. Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

4. Date of birth

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

 /

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

 /

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

5. Address

SUBURB STATE POST CODE

6. Phone number

BUSINESS HOURS
<input type="text"/>

AFTER HOURS
<input type="text"/>

MOBILE NUMBER
<input type="text"/>

7. Email address

@

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 E

Tax File Number

11. 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
- it will make it much easier to trace difference superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

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

PART F

Document list

12. 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
- Certified copies of documents requested to prove your identity
- Other (please specify below)

PART G**Member declaration**

13. I declare that:

- I have been advised to read the Product Disclosure Statement package before completing this application form
- 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 Tax File Number is optional and that if I have not provided my Tax File Number, tax will be deducted at the highest marginal rate
- the Tax File Number I have provided is the same number advised to me by the Australian Taxation Office
- the Tax File Number 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

Signature

SIGNATURE							
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Date signed

D	D	/	M	M	/	Y	Y	Y	Y

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

PART H**Lodgement**

14. Send your completed application and attachments to:

MilitarySuper
PO Box 22
BELCONNEN ACT 2616

..... **END FORM**

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

You do not need to return this page with your form.

**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