

Application for Child's Benefits (including Ancillary Benefits)

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?

This form should be completed by, or on behalf of, **an eligible child where a Member, former Member or pensioner of the Military Superannuation and Benefits (MSB) Scheme dies and is not survived by an eligible spouse.**

For the definition of an eligible child please contact ComSuper or MilitarySuper's website at www.militarysuper.gov.au.

Completing this form

Complete:

- **Part A:** About the deceased
- **Part B:** About the child
- **Part C:** About the person claiming the benefit
- **Part D:** Full-time student details
- **Part E:** Identification requirements
- **Part F:** Payment details
- **Part G:** Document list
- **Part H:** Tax File Number
- **Part I:** Applicant declaration

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

Ancillary Benefit

The lump sum benefit will include an Ancillary Benefit if any of the following amounts were paid into the deceased person's MilitarySuper account:

- 1) Additional Personal Contributions.
- 2) Salary Sacrifice amounts.
- 3) Transfer Amounts.
- 4) Spouse Contributions (please note that spouse contributions are those paid by the deceased person's partner into the deceased's MilitarySuper account)
- 5) Co-Contributions.
- 6) Super Guarantee amounts.

The Ancillary Benefit is payable as a cash lump sum only.

There is no pension or rollover option.

Surcharge debt

If the deceased was a Member of the Defence Force at the time of death and had a superannuation contribution surcharge debt, it will be deducted from the benefit before payment.

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

Tax File Number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, the MSB Board is required to deduct PAYG tax at the highest marginal tax rate plus 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 Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

Taxation matters

Lump sums paid to dependants on the death of a Member are not considered to be Superannuation Lump Sum Payments for the purposes of the taxation legislation.

Any pension that is paid is taxed as income.

Payment

Lump sum payments and rollover cheques are normally paid within 15 working days after the date we receive the application and verify eligibility, whichever is the later.

Further information

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

- Product Disclosure Statement
- Death and Dependants' Benefits Fact Sheet
- Superannuation Contributions Surcharge Fact Sheet
- Fact Sheets on each Ancillary Benefit type

All these publications are available on the MilitarySuper website at www.militarysuper.gov.au

A Financial Advisor may also be able to assist.

Privacy

The MSB Board and its Administrator, ComSuper, are collecting the information on this form for the following reasons:

- to confirm your identity
- to assess your eligibility for payment of the benefit
- to pay your benefit
- to contact you

The MSB Board and ComSuper are committed to protecting any personal information we hold about you. Your information will not be used for any other purpose or disclosed to another party unless:

- you authorise us to do so
- the disclosure is authorised by law. This may include disclosing your personal information to other Government agencies that have specific legislative authority to collect this information (for example the Australian Taxation Office, Centrelink or the Department of Veterans' Affairs). We will not disclose your personal information to these agencies unless it is lawful to do so
- it is to Colmar Brunton 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 Colmar Brunton, please put a cross in the box at Question 23A on page 7 of the benefit application form.

Contact

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:

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 9617

Internet

www.militarysuper.gov.au

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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11. Are there other children who may be eligible for a benefit? No – Go to **Part C**
 Yes – Go to **Question 11a.**
- 11a. Please provide details of other children who may also be eligible for a benefit. If any of the children are not in your care please attach the name(s) and address(es) of the relevant guardian(s). Please indicate if you have submitted a separate application form for that child.

Surname of child

Given name(s)

Date of birth / /

Relationship to the deceased (e.g child, adopted child, or a child within the meaning of the *Family Law Act 1975*)

Has a separate application been submitted? No Yes

If there are more than three children please attach the same details as above for each additional child.

Surname of child

Given name(s)

Date of birth / /

Relationship to the deceased (e.g child, adopted child, or a child within the meaning of the *Family Law Act 1975*)

Has a separate application been submitted? No Yes

If there are more than three children please attach the same details as above for each additional child.

PART C

About the person claiming the benefit

AML/CTF legislation requires us to verify the ID of the payee. Therefore if the child’s guardian is receiving payment on the child’s behalf we must receive the guardians ID documents as listed in Part E. If the child is over 18 years of age, payment will be made directly to the child. ID requirements for a child are also listed in Part E. Of course, we will also require documentation for the child to determine eligibility for the benefit.

12. Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

These documents may be the same as provided to confirm the eligibility of a child of the deceased, and need to be certified.

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 persons listed in the section **Attachment Reference** at the end of this form.

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 I**Applicant declaration**

23. I declare that:

- I have been advised to read the Product Disclosure Statement for the MSB Scheme 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 H** — 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 rate
- the TFN I have provided is the same number advised to me by the Australian Tax Office
- the TFN 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.

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

YOUR SIGNATURE

YOUR SIGNATURE	

Date signed

D	D	/	M	M	/	Y	Y	Y	Y

PART J**Lodgement**

24. 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

**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