

Application for payment of a spouse or de facto partner benefit upon the death of a SASS pensioner

Use this form.....

if you have been informed in writing by Pillar Administration, of your entitlement to payment of a reversionary (spouse or de facto partner) pension benefit following the death of a SASS pensioner.

Do not use this form.....

if you are applying for payment of a benefit that does not relate to the death of a SASS pensioner.

How to apply

- ▶ In order to understand the eligibility requirements and any conditions for payment, read the *Notes for applicants* section.
- ▶ Please look at the website or contact Customer Service for copies of any Fact Sheets that may be relevant to your application.
- ▶ Before you apply, you may also wish to discuss your options with your accountant or other professional financial adviser.
- ▶ Read the *What to do next* section at the end of the form to understand what supporting documents you may need.
- ▶ Send the form and other supporting documents to:

State Super (SASS)
PO Box 1229
Wollongong NSW 2500

If you need help with this form

Contact Customer Service
phone **1300 130 095**
(for the cost of a local call)
email: enquiries@stc.nsw.gov.au

Notes for applicants

Who can apply?

On the death of a SASS pensioner, their legal spouse or de facto partner (which may include a partner of the same sex) is eligible to apply for payment of a reversionary pension benefit.

Pension payments

Your pension can be paid by direct deposit into your nominated bank, building society or credit union account. However, direct crediting may not be available on all accounts. To confirm this facility is available for your account, please check with your financial institution.

Pension overpayments

Important Note: The following is only applicable if you have been informed that there is an outstanding debt payable to SASS from the deceased's estate.

Under the legislation, if there was an amount of pension overpaid to the deceased that has not been repaid from the estate to SASS, the Trustee is able to recoup the overpayment by making a deduction from any arrears of pension payable to you from SASS.

Unless you inform us in writing that you do not agree with this proposal, the overpayment amount will be deducted from the pension arrears payable to you at the time your pension is processed.

Please notify us in writing if you wish to make other arrangements to repay the pension overpaid amount.

Is tax payable on death benefits?

No tax is payable on SASS death benefits if you are aged 60 or over when the benefit is received, or your spouse was aged 60 or over at the date of death.

For more information about the payment of tax and death benefits, please see STC Fact Sheet 3 – *Taxation*.

Providing your Tax File Number

Under the *Superannuation Industry (Supervision) Act 1993 (Cth)*, STC, the trustee of SASS and SANCS, is authorised to collect your Tax File Number (TFN), which may only be used for lawful purposes. These purposes may change in the future as a result of legislative change. It is not an offence not to quote your TFN, however, if you do not quote your TFN, tax may be deducted from any benefit paid to you at a higher rate than would otherwise be the case.

Note: If you are not required to pay tax on your pension benefit (eg you are over age 60), you do not need to provide us with your TFN.

Your privacy

The information you provide in this form is collected on behalf of and held for State Super by the scheme administrator, Pillar Administration, in accordance with the *Privacy and Personal Information Protection Act 1998 (NSW)* and the *Health Records and Information Privacy Act 2002 (NSW)*, under which you have rights of access and correction. Information you provide may be disclosed to lawfully authorised government agencies.

For further information about privacy, contact Pillar Administration by writing to PO Box 1229 Wollongong NSW 2500 or visit www.statesuper.nsw.gov.au for State Super's Privacy Statement.

Proof of identity

If you have already supplied the required 'proof of identity' documents during the process of determining your benefit entitlement, you do not have to do so again. Please see the *What to do next* section before forwarding your application to Pillar.

please turn over ►

1. Who is the applicant?

My relationship to the deceased scheme member is;
(tick only one of the following boxes)

- spouse; or
 de facto partner; or
 legal personal representative of a spouse or defacto who is incapable of administering their own affairs.

Title (eg Mr Mrs Ms Miss Dr)

Family name

Given name/s

Residential address

Suburb, Town, City

Postcode

Postal address (if relevant, include company name)

Suburb, Town, City

Postcode

Daytime contact telephone number

2. Details of the deceased scheme member

Member number

Title (eg Mr Mrs Ms Miss Dr)

Date of birth

DD	MM	YY
/	/	

Family name

Given name/s

Date of death

DD	MM	YY
/	/	

3. Payment Details

Please pay my fortnightly pension directly into this account:

Account Name

Account Number

BSB Number

Name of bank/building society/credit union

Branch

4. Payment of debts on the account

Complete this section only if you have been informed of an outstanding debt that is payable to SASS from the deceased's estate.

I elect for any pension overpayments to be paid:

- by deduction from any pension arrears payable to me.
 by cash payment (cheque attached).

5. Authority for deductions from pension

Complete this section **only if** you want health insurance premiums to be deducted automatically from your pension payments.

Pillar can only forward payments to the following Health Funds:

Australian Health Management Group Ltd, Australian Unity Health Ltd, Hospital Contributions Fund of Australia Ltd, Manchester Unity Australia Ltd, MBF Australia Ltd, Medibank Private Ltd, NIB Health Funds Ltd, Railway & Transport Health Fund Ltd, St Luke's Medical & Hospital Benefits Association Ltd, Teachers Federation Health Ltd, United Ancient Order of Druids Friendly Society Ltd, Westfund Ltd.

I authorise Pillar to deduct health insurance premiums from my pension each fortnight and forward these to the health fund nominated below:

Name of health fund

Registered No.

Table (Plan)

Amount per fortnight

\$

I acknowledge that the nominated amount of premium may be varied in the event that notice of change is received by Pillar from the health fund.

Note: This authority will continue to remain in force until such time as written notice is provided to Pillar to vary or revoke the original instruction.

6. Applicant - please sign here

I certify that the information given in this form is correct.

Signature

Name (please PRINT)

Date

DD / MM / YY

7. What to do next

Once you have completed this form, the following documents (if applicable) should be attached:

- Completed Tax File Number collection form
- Certified copy of your proof of age and identity documentation - see Section 8.

All forms are available from the website and Customer Service.

Post the completed form and supporting documents to:

**State Super (SASS)
PO Box 1229
Wollongong NSW 2500**

If you require help with this form, please contact:

Customer Service on 1300 130 095 (for the cost of a local call unless you are calling from a mobile or pay phone) or email enquiries@stc.nsw.gov.au

8. Proof of Identity Information

If you have not already done so, you will need to provide certified[†] documentation with your application form to prove your entitlement to the superannuation benefits.

The following certified documents must be provided with your application form:

Either

One of the following certified documents:

- Drivers licence issued under State or Territory law, or
- Passport

OR

One certified document from each of the following groups:

Group 1

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth Government
- Pension card issued by Centrelink that entitles the person to financial benefits

Group 2

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address ie, Tax Office Notice of Assessment or Rates Notice from local council.

Section 8 continued over page ►

8. Proof of Identity Information (continued)

Change of name

Make sure that proof of change of name, eg. Marriage certificate is also provided if your current name is not the same as the name on these documents.

† Certified means that all copied pages of original proof of identity documents or change of name documents have been certified as true copies by an individual approved to do so. Persons who are authorised to certify documents must sight the original and the copies and make sure both documents are identical, then make sure that all copies are certified as true copies by writing or stamping 'certified true copy' followed by the individual's signature, printed name, qualification and date.

The following persons are eligible to certify copies of original documents:

- An agent or permanent employee of Australia Post with two or more years of continuous service
- A finance company officer with two or more years of continuous service (with one or more finance companies)
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL) having two or more years of continuous service with one or more licensees
- A notary public officer
- A police officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of the court
- A magistrate
- A Chief Executive Officer of a Commonwealth Court
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership