

Application for Payment of a Spouse or De Facto Partner Benefit upon the Death of a SASS Pensioner

Please print clearly in black ink.

Use this form...

- ▶ If you have been informed in writing by Mercer 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 visit State Super at statesuper.nsw.gov.au 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 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)
GPO Box 2181
Melbourne VIC 3001

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 overpaid pension amount.

Is tax payable on death benefits?

Generally 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. Some tax may be payable if your pension is more than \$118,750 per annum.

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.

If you need help with this form

Contact Customer Service between 8:30am and 5:30pm (AEST) Mon–Fri on **1300 130 095** or email enquiries@stc.nsw.gov.au.

Notes for applicants (continued)

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 Mercer.

Mark one box with a cross.

1. Who is the applicant?

My relationship to the deceased scheme member is:

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

Mr/Mrs/Ms/Miss/Dr Given name(s)

Family name

Residential address

Suburb

State/Territory

Postcode

Postal address (if different from residential address)

Suburb

State/Territory

Postcode

Work or Home Daytime contact telephone number

Mobile number

Email address

2. Details of the deceased scheme member

Mr/Mrs/Ms/Miss/Dr Male Female Birth date (DD-MM-YYYY)

/ /

Given name(s)

Family name

Member number

Date of death (DD-MM-YYYY)

/ /

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3. Payment details

Please pay my fortnightly pension directly into this account:

Account name *(The account must be held solely, or jointly in your name)*

BSB number

Account 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 (please contact us so that we can provide you with EFT details).

5. Authority for deductions from pension

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

Mercer can only forward payments to the following Health Funds:

Australian Unity Health Ltd, HCF, BUPA, Medibank Private, NIB, RT Health Fund, St Lukes Health Insurance, Westfund Ltd.

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

Name of health fund

Registered number

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 Mercer from the health fund.

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

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6. Applicant - please sign here

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

I have reviewed Section 8 - Proof of Identity and Section 9 - Electronic Verification, and confirm the following (please select one or more):

I am not required to provide proof of identification as I have provided this during the process of determining my benefit entitlement.

I have provided certified proof of identity documents

If my proof of identity documents are not certified correctly, I consent to State Super or Mercer Administration Services (the fund administrator) verifying my identification electronically.

I have provided electronic verification information in Section 9. I consent to State Super or Mercer Administration Services (the fund administrator) verifying my identification electronically.

Note - if you provide authorisation to have your identity verified electronically but the documents are not compatible, you will need to provide certified copies of the required documents. We will contact you if this is the case.

Name (Print in BLOCK LETTERS)

Signature

Date (DD-MM-YYYY)

7. What to do next

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

- Completed *ATO Tax File Number Declaration*.
- Certified copy of your proof of age and identity documentation – see section 8, or electronic verification information.

All forms are available from Customer Service.

Return the completed form to

State Super (SASS)
GPO Box 2181
MELBOURNE VIC 3001

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Contact Customer Service between 8:30am and 5:30pm (AEST) Mon–Fri on **1300 130 095** or email **enquiries@stc.nsw.gov.au**.

Your privacy

The information you provide in this form is collected on behalf of and held for State Super by the scheme administrator, Mercer Administration Services (Australia) Pty Ltd, in accordance with STC's Privacy Statement, 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 and third parties.

For further information about privacy, contact Mercer by writing to:

GPO Box 2181
Melbourne VIC 3001

or visit

www.statesuper.nsw.gov.au

ABN 29 239 066 746
SPIN SAS0101AU

8. Proof of identity

You may need to prove your identity by providing certified[†] proof of identity documentation or electronic verification information with your application to prove that you are the person to whom the superannuation entitlements belong.

You can either provide certified proof of identity documents that must be posted to us (see below) or alternatively, you can provide the information in Section 9 - Electronic verification, which will enable us to verify your information electronically.

The following certified documents can be accepted:

Either

One of the following certified documents:

- Current Australian State or Territory drivers licence containing a photograph of the person, or
- Australian Passport, or
- Current card issued under a State or Territory law for the purpose of providing a person's age containing a photograph of the person, or
- Current foreign passport or similar travel document containing a photograph and the signature of the person*

OR

One certified document from each of the following groups:

Group 1

- An Australian birth certificate or birth extract issued by a State or Territory
- Citizenship certificate issued by the Commonwealth
- Current pension card issued by Centrelink that entitles the person to financial benefits

Group 2

- Notice issued by the Commonwealth or a State or Territory government within the preceding 12 months that records the provision of financial benefits to you, i.e., a letter from Centrelink.
- Notice issued by the Australian Taxation Office within the past twelve months that contains your name and residential address and records an amount payable to or by you, i.e., your last tax assessment.

- Notice issued by a local government body or utilities provider within the past three months showing the provision of services to you and your current residential address, i.e., water, gas or electricity bill, rates notice.

* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

Change of name

Make sure that proof of change of name is also provided if your current name is not the same as the name on these documents, e.g. Change of name certificate, or deed poll document.

If your name has changed on marriage, a marriage certificate issued by the Registry of Births, Deaths and Marriages is required; ceremonial marriage certificates are not acceptable.

[†] 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.

If you are in Australia

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

- Australia Post Permanent Employee or Agent (who is currently employed with the post office and has at least two continuous years of service or is in charge of supplying postal services to the public)
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank Officer, Building Society Officer or Credit Union Officer (with two or more years of continuous service)

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8. Proof of identity *continued*

- Chiropractor
- Commissioner for Affidavits or Declarations
- Court Officer: Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- Dentist
- Fellow of the National Tax Accountants' Association
- Finance Company Officer (with two or more years of continuous service with one or more finance companies)
- Justice of the Peace
- Legal practitioner
- Marriage celebrant (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- Medical practitioner
- Member of Chartered Secretaries Australia
- Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority (State or Territory)
- Member of Engineers Australia (other than at the grade of student)
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- 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 two or more years of continuous service or 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
- Minister of Religion (registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- Notary Public
- Nurse
- Optometrist
- Officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees
- Officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more years of continuous service with one or more licensees
- Patent attorney
- Permanent employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority) or a Local Government Authority with two or more years of continuous service
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Pharmacist
- Physiotherapist
- Police Officer, Sheriff's Officer or Sheriff
- Psychologist
- Senior Executive Service Employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority)
- Teacher employed on a full-time basis at a school or tertiary education institution
- Trade marks attorney
- Veterinary surgeon

If you are outside Australia

The following people are eligible to certify copies of original documents outside of Australia:

- consular staff at an Australian Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

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