

APPLICATION FOR PAYMENT IN RELATION TO A DECEASED MEMBER



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Please complete all the details on this form in **BLOCK LETTERS** and return the signed original to Super SA.

1. Deceased Member Details

Super ID

Mr Ms Miss Mrs Dr Prof

Surname

Given name(s)

Residential address

Postcode

Postal address (if different from above)

Postcode

Date of birth / /

* For a partner to be recognised as a putative spouse, they need to satisfy the requirements under the *Superannuation Act 1988 (conditions apply)*. In general terms, the person must have been living as husband and wife de facto (or with the distinguishing characteristics of a married couple in the case of same sex couples) with the member at the date of death of the member and have either:

- lived continuously with them for a period of three years immediately before the date of death, or
- lived with them for an aggregate period of three out of four years immediately before the date of death, or
- had a child born of the relationship of whom both are the parents.

A person will also be recognised as a putative spouse of the member if in a Registered Relationship with the member as at the date of death (within the meaning of the *Relationships Register Act 2016*).

Contact us

Address

Ground floor, 151 Pirie Street
Adelaide SA 5000
(Enter from Pulteney Street)

Postal

GPO Box 48, Adelaide, SA 5001

Call

(08) 8207 2094 or 1300 369 315 (for regional callers)

Email

supersa@sa.gov.au

Website

www.supersa.sa.gov.au

Important Information

If the deceased member was an eligible member of Triple S and purchased voluntary Death and TPD insurance through Triple S, you will need to make a separate claim for this. See the *Triple S Death and Total and Permanent Disablement Insurance* fact sheet for more information.

Did the deceased member have Death and TPD insurance through Triple S?

Yes No Not sure

2. Details of Claimant

(please complete only Part A or Part B)

The *Superannuation Act 1988* provides that a deceased member's entitlement must be paid to the member's spouse/putative spouse* if a spouse/putative spouse survives the deceased member. If there is no surviving spouse/putative spouse payment will be made to the deceased member's Estate.

Please note that you are required to provide documents that prove your identity when you submit this application. See the *Proof of Identity* fact sheet for more information.

A) Details of spouse/putative spouse* (if applicable)

Under Section 46 of the *Superannuation Act 1988*, a spouse's entitlement can be divided between a lawful spouse and a putative spouse (conditions apply). A surviving spouse/putative spouse must provide any known information relevant to this Section of the Act.

Relationship to deceased

I am:

Married Separated Divorced Putative (includes same sex partner)*

Surname

Given name

Previous family name (widows only)

Contact address

Postcode

Telephone

Date of birth / / Sex F M

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Are you entitled to, or are you receiving weekly/fortnightly workers compensation in relation to your spouse/putative spouse's death? Yes No

Important

If you wish to nominate a bank account for your benefit to be paid to, we require you to provide a bank statement (eg printed statement or online statement from a bank or credit union) for the account. These statements need to be current (ie less than 12 months old) and must show your BSB, account number and your full name on the account.

Please note

Payments cannot be made to third party accounts, credit cards or overseas accounts.

Super SA does not accept responsibility for rejection of transfer due to incorrect account details being provided by you.

B) Payment details

Name of financial institution _____

Branch _____

Account name (account holder name) _____

BSB number (compulsory) -

Account number

When completing your account details, please use numbers only. Characters and symbols will not be recognised. For more information, contact your financial institution.

C) Details of eligible children/students (if applicable)

In relation to a deceased member, an eligible child/student is:

- a. (i) a child of the member, or
(ii) a child in relation to whom the member had assumed parental responsibilities and who was cared for and maintained, wholly or in part, by the member up to the date of the contributor's death.
- b. (i) under the age of 16 years, or
(ii) between the ages of 16 and 25 years and in full-time attendance at an educational institution recognised by the Board for the purposes of this definition.

Please provide a certified copy¹ of the Birth certificate of any children under the age of 16 years.

| Surname | First name | Date of birth |
|---------|------------|---------------|
| | | |
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| | | |

Students between the ages of 16 and 25 years who may be eligible for a student pension must complete a student application form and provide tax details, bank details and a bank statement to confirm the details, together with a certified copy¹ of their birth certificate. Please contact Super SA for further information.

D) Details of Executor/Administrator of the Estate

(Please complete ONLY if there is no surviving legal spouse/putative spouse and provide copies of documentary evidence supporting your appointment as executor/administrator.)

Name _____

Contact address _____

Postcode _____

Telephone _____

¹Certified copies are copies authorised, or stamped as being true copies of the originals, by a person or agency recognised by the law of the state in which they are certified. These include: a Justice of the Peace, Commissioner for taking Affidavits, a Notary Public or a Proclaimed Police Officer. Documents must be certified within the last six months.

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E) Other evidence (must be provided before payment can be made)

- Certified copy of the death certificate
- Certified copies¹ of the following documents, if applicable:
 - Legal marriage certificate, *issued under the Births, Deaths and Marriages Act 1996*
 - Registered relationship certificate, demonstrating that the relationship was registered in accordance with the *Relationships Register Act 2016* as at the date of the member's death. The certificate must be issued at or after the member's date of death.
- Statutory declarations supporting putative spouse status (if applicable. Note: this is not required for those who have evidence of a Registered Relationship as listed above), forms available from Super SA
 - Statutory declaration by applicant
 - Statutory declaration by independent person
- Proof of identity documents.

3. Statutory Declaration

I,

_____ (Full name of person making the declaration)

of

_____ Postcode

_____ (Address of person making the declaration)

do solemnly and sincerely declare that to the best of my knowledge and information, the statements on this application are true and complete. I undertake that if a payment is made to me pursuant to this application and the Treasurer is subsequently required by law to recover the money so paid or any part thereof, I will repay such money or part thereof to the Treasurer.

I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the *Oaths Act 1936* (SA).

Declared at

_____ in the State/Territory of

this

_____ day of

_____ 20

Signature

_____ (Signature of declarant)

before me[^]

_____ (Signature of witness)

Name of witness

Address of witness

_____ Postcode

Title or qualification of witness[^]

[^]A witness must be one of the following: a Justice of the Peace, Commissioner for taking Affidavits, a Notary Public and a Proclaimed Police Officer.

**SUPER SA**
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- > Accepted documents
- > Primary photographic identification documents
- > Primary non-photographic identification documents
- > Secondary identification documents
- > Providing the documents to Super SA
- > Who can certify a copy of your identification documents?

A 'certified copy' is a copy of an original document that has been signed and certified by an authorised person (see list on page 2).

The authorised person must see the original document and certify that the copy is a 'certified true copy' of the original document.

All pages of the document need to be certified as a true copy of the original by writing 'certified true copy' on each page. The certification must contain an original signature. Faxed copies cannot be accepted.

Documents must be certified and dated within the last six months.

Identification documents can be provided either as original documents or as certified copies of original documents.

Among the reforms introduced by the Commonwealth Government in relation to anti-money laundering and counter-terrorism financing (AML/CTF) is the requirement for those claiming super entitlements to provide proof of identity.

This means that you or your representative (if applicable), are required to provide proof of identity when applying for the payment of a cash entitlement. For any exceptions to this requirement refer to the boxout section opposite.

Accepted documents

Super SA must be able to verify your name, date of birth and residential address from:

- an original document or
- a certified copy or
- a certified extract from an original document.

The source documents may be either:

- a primary photographic identification document (your name and either your date of birth or residential address)

or

- both a primary non-photographic identification document and a secondary identification document (your name, date of birth and residential address).

The documents must be valid and not have expired. The only exception to this is a passport issued by a Commonwealth country, providing it expired less than two years ago.

Exceptions**Post-retirement products**

Proof of identity documents are required for Super SA's Income Stream and Flexible Rollover Product only in the following situations:

- opening a Flexible Rollover Product or Income Stream account (provision of a designated service)
- payment of a death benefit on commencing a reversionary pension
- full or partial cash payments (unless proof of identity documents are already held in the member's current name).

Note: if Super SA holds a copy of your proof of identity documents, which are currently valid and show your current details, then those documents on file can be used to verify a withdrawal application. If the identification records you have previously provided to us are expired or the address on the proof of identity documents we hold doesn't match the address we have on our records, we will require you to provide up-to-date, certified proof of identity documents.

Division 293 tax payment

To make a Division 293 tax payment directly to the ATO from a Super SA account, proof of identity documents are *not* required.

Primary photographic identification documents

A primary photographic identification document is one of the following:

- a driver's licence containing your photograph
- a passport issued by the Commonwealth of Australia
- a passport or similar document issued for international travel purposes by a foreign government, the United Nations or an agency of



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IN THIS FACT SHEET

- > Accepted documents
- > Primary photographic identification documents
- > Primary non-photographic identification documents
- > Secondary identification documents
- > Providing the documents to Super SA
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the United Nations, which contains your photograph and signature. If necessary, you must also provide an English translation prepared by an accredited translator

- a proof of age card containing your photograph
- a national identity card issued for the purpose of identification by a foreign government, the United Nations or an agency of the United Nations, which contains your photograph and signature. If necessary, you must also provide an English translation prepared by an accredited translator.

Primary non-photographic identification documents

A primary non-photographic identification document is one of the following:

- a birth certificate or birth extract issued by an Australian State or Territory
- a citizenship certificate issued by the Commonwealth Government
- a citizenship certificate issued by a foreign government. If necessary, you must also provide an English translation prepared by an accredited translator, unless the person who sights the document understands the language it is written in
- a birth certificate issued by a foreign government, the United Nations or an agency of the United Nations. If necessary, you must also provide an English translation prepared by an accredited translator
- a pension card issued by Centrelink that entitles you to financial benefits.

Secondary identification documents

A secondary identification document is one of the following documents containing your name and residential address:

- a notice issued to you by the Commonwealth, or a State or Territory government within the preceding 12 months, that shows you have received financial benefits from that government
- a notice issued to you by the Australian Taxation Office within the preceding 12 months which records details of a Commonwealth tax debt or rebate
- a notice issued by a local government body or utilities provider within the preceding three months which records the provision of services to you or your address.

If you do not have any of the documents listed above, please contact Super SA to discuss your options.

Providing the documents to Super SA

Identification documents can be provided either as original documents or as certified copies of original documents.

If you provide original documents please bring them to the Super SA Member Centre, Ground Floor 151 Pirie Street (enter from Pulteney Street), Adelaide. A Super SA staff member will sight the documents and take a photocopy for our records and return the originals to you immediately.

If you provide certified copies then you can post the documents or deliver them in person to Super SA when you apply for payment of your cash entitlement. Super SA will retain these documents.

Who can certify a copy of your identification document(s)?

Under AML/CTF rules, the following people are able to certify that copies of your documents are true extracts of the originals:

- 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

A certified copy is a copy of an original document that has been signed and certified by an authorised person.

The authorised person must see the original document and certify that the copy is a certified true copy of the original document.

All pages of the document need to be certified as a true copy of the original by writing 'certified true copy' on each page.

The certification must contain an original signature. Faxed copies cannot be accepted.



IN THIS FACT SHEET

- > Accepted documents
- > Primary photographic identification documents
- > Primary non-photographic identification documents
- > Secondary identification documents
- > Providing the documents to Super SA
- > Who can certify a copy of your identification documents?



You cannot certify your own documents, even if you fall under one of the accepted categories.

- a person who is currently licensed or registered to practise one of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trademarks attorney
 - Veterinary surgeon
- an officer or authorised representative of a holder of an Australian financial services licence, with two or more continuous years of service with one or more licensees
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- an Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- a bailiff
- a chief executive officer of a Commonwealth court
- a clerk of a court
- a commissioner for Affidavits
- a commissioner for Declarations
- an employee of the Australian Trade Commission who is:
 - in a country or place outside Australia and
 - authorised under paragraph 3 (d) of the *Consular Fees Act 1955* and
 - exercising his or her function in that place
- an employee of the Commonwealth who is:
 - in a country or place outside Australia and
 - authorised under paragraph 3 (c) of the *Consular Fees Act 1955* and
 - exercising his or her function in that place
- a fellow of the National Tax Accountants' Association
- a finance company officer with two or more years of continuous service
- a holder of a statutory office
- a judge of a court
- a Justice of the Peace
- a magistrate
- a marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- a master of a court
- a member of Chartered Secretaries Australia
- a member of Engineers Australia, other than at the grade of student
- a member of the Association of Taxation and Management Accountants
- a 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
- a member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants (IPA)



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- > Who can certify a copy of your identification documents?

- a member of:
 - the Parliament of the Commonwealth or
 - the Parliament of a State or
 - a Territory legislature or
 - a local government authority of a State or Territory
- a minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- a notary public
- a permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
- a permanent employee of:
 - the Commonwealth or a Commonwealth authority or
 - a State or Territory or a State or Territory authority or
 - a local government authority
 with two or more years of continuous service who is not specified in another item in this Part
- a person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- a police officer
- a registrar, or Deputy Registrar, of a court
- a Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority or
 - a State or Territory or a State or Territory authority
- a sheriff
- a sheriff's officer

- a teacher employed on a full-time basis at a school or tertiary education institution
- a member of the Australasian Institute of Mining and Metallurgy.

Except where stated, the categories above relate to positions and offices held within Australia. If you are overseas for any reason, you need to have your documents certified by an Australian consular officer, an Australian diplomatic officer or you should contact Super SA for alternative arrangements. You cannot certify your own documents, even if you fall under one of the above categories.

Further information

To find out more about the AML/CTF reforms visit the Commonwealth Government Attorney-General's Department website at www.ag.gov.au/aml or the Australian Transaction Reports and Analysis Centre, (AUSTRAC) website at www.austrac.gov.au. If you have any general enquiries about accessing your super entitlement, contact Super SA.

Contact us

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