

# Application for payment of benefit

Compassionate grounds

## How to apply

This form and information sheet will help you apply for the early release of your super benefit on compassionate grounds.

### 1 Check that you're eligible

You can apply to access your super benefit on 'compassionate grounds' if you need the money to pay for:

- medical expenses for you or your dependants
- partial payment of home loans to avoid foreclosure of the loan
- modification of a home or vehicle for you or your dependants suffering a severe disability
- the cost of palliative care for you or your dependants
- funeral costs for a dependant
- medical transport for you or your dependants.

If any of the grounds listed above apply to you, you can apply to the Department of Human Services (DHS) for the release of your super benefit on compassionate grounds. If DHS approves your application, you'll then need to apply to AustralianSuper.

### 2 Apply to DHS

Call DHS on 1300 13 10 60 to find out if you're eligible to request the early release of your super benefit on compassionate grounds.

DHS has separate forms for each of the grounds listed above in step 1. You'll need to fill in the forms that apply to your situation.

Detailed information and the relevant forms are available on the DHS website at [www.humanservices.gov.au](http://www.humanservices.gov.au)

#### DHS will need to know your account balance

When you apply for the release of your super benefit, DHS will ask you how much money you currently have in your account.

To find out the balance of your super account contact AustralianSuper on **1300 300 273** or login to your account at [www.australiansuper.com](http://www.australiansuper.com)

### 3 Apply to AustralianSuper

If DHS approves your claim, please complete the attached *Application for payment of benefit – Compassionate grounds* form and return it to us together with:

- the DHS approval letter (the original or certified copy), and
- the right certified ID. See 'Providing proof of your identity (ID)' overleaf.

Please read and complete the form carefully, including the Tax File Number notification section on page 4. It's important to note that if you don't quote your TFN, any payment to you will have the maximum tax deducted as required by legislation.

#### Send the documents to AustralianSuper

Because we need to see original signatures on both your form and certified ID you must send these documents to us – you cannot fax or email them.

Send your documents to:

AustralianSuper  
GPO Box 1901  
MELBOURNE VIC 3001

Continued overleaf >

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Member number

## Providing proof of your identity (ID)

If you don't provide the right ID – correctly certified – it will delay the payment of your super benefit. Please read the information below very carefully.

### Get the right ID together

Withdrawal amounts	The ID you'll need
Up to \$10,000	A CURRENT driver's licence or passport
\$10,001 up to \$50,000	A CURRENT driver's licence or passport, and One CURRENT bill (power, telephone) or bank statement with the same mailing address as your super fund contact address
\$50,001 or more	A CURRENT driver's licence or passport, and Two CURRENT bills (power, telephone) or bank statements with the same mailing address as your super fund contact address.

### Photocopy your ID

You need to show both the ORIGINAL ID and a photocopy of your ID to the person authorised to certify ID. Please photocopy both sides of your licence.

### Get your ID certified properly

Most people find it easy to get their ID certified at a:

- police station, or
- post office.

To certify your ID, the authorised person needs to:

- a) Compare the photocopy to the ORIGINAL.
- b) Stamp or write 'This is a true and correct copy of the original' followed by their signature, printed name, address, telephone number, qualification (eg Australia Post employee\*, police officer) and the date.

If you don't have a passport or driver's licence or can't get to a post office or police station, download a copy of *A guide to providing proof of your identity* from [www.australiansuper.com/forms](http://www.australiansuper.com/forms) This guide lists all the people who can certify ID and the original documents you can use if you don't have a passport or driver's licence.

\* Must be a permanent employee with at least 5 years of continuous service.

## Tax File Number notification

Under the *Superannuation Industry (Supervision) Act 1993*, your super fund is authorised to collect your Tax File Number (TFN), which will only be used for lawful purposes.

These purposes may change as a result of legislative change. The trustee of your super fund may disclose your TFN to another super provider when your benefits are being transferred, unless you request otherwise in writing.

It's not an offence not to quote your TFN. But if your super fund doesn't have your TFN:

- your super contributions will be taxed at the highest marginal tax rate plus Medicare levy
- you won't be able to make personal contributions to your super account
- it'll be more difficult to trace different super accounts in your name.

## Privacy law

The National Privacy Principles (NPPs), which are a part of the *Privacy Act 1998*, came into effect on 21 December 2001. The aim of the NPPs is to ensure that organisations that hold information about people handle the information responsibly. The NPPs also give people some control over the way information about them is handled.

Under the NPPs, each time AustralianSuper collects information we're required to advise you that:

- AustralianSuper can be contacted on **1300 300 273**
- you may have access to the information the Fund holds about you and you may have that information corrected if it's wrong
- the information is collected so we can administer and look after your interests in the Fund
- your details are used to send you relevant information on the value added products to which your Fund membership gives you access. If you don't wish to receive this information, please write to AustralianSuper or telephone **1300 300 273**, and
- if the information is not provided, the Fund may have difficulties in administering and looking after your interest in the Fund.

If you have any questions about your rights under the privacy legislation, please call AustralianSuper on **1300 300 273**.

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Please complete in pen using BLOCK letters. Print 'X' to mark boxes where applicable. Form must be completed in full.

## 1. MEMBER DETAILS

Surname	Mr	Ms	Mrs	Miss	Dr	Other
<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Given names	Date of birth					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street address						
<input type="text"/>						
Suburb	State		Postcode			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address (if different)						
<input type="text"/>						
Suburb	State		Postcode			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (BH)	(AH)	Mobile				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Member number					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Important note: If you provide your email details on the application form(s) and you do not agree to AustralianSuper using these details for the purpose of emailing you information about superannuation products and services, investment information, and third party products, please mark the box here.

## 2. DHS APPROVAL LETTER

You must attach either a certified copy or the original approval letter provided by the Department of Human Services (DHS). See page 1 of this form for details.

## 3. BANKING DETAILS FOR YOUR PAYMENT

In your DHS approval letter, DHS will advise you if the payment is to be made to a third party, eg into a mortgage account. But if the payment is to be made directly to you, you'll need to complete this section.

Electronic Funds Transfer (EFT) payment

I would like my benefit payment to be transferred/paid to me electronically. My nominated account details for EFT are as follows:

Account name	Name of bank or financial institution					
<input type="text"/>	<input type="text"/>					
Branch	BSB number	Account number				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

NB: You may also wish to provide a bank statement to verify your account number.

Cheque payment

## 4. PARTIAL PAYMENT

If you're requesting a partial payment, you can choose which investment option your benefit is paid from. If you decide not to nominate a specific investment option, the partial payment will be deducted equally from all investment options – except AustralianSuper's Member Direct investment option. Please specify your chosen investment option below. If you need more space, please attach a separate sheet.

If you would like to sell your Member Direct option holdings before we process your partial payment, please indicate below:

Yes, sell my Member Direct option holdings prior to processing this application.

No, I don't wish to sell my Member Direct option holdings prior to processing this application.

Please note: If you do not want your Member Direct option holdings sold, you must maintain a minimum account balance of \$5,000 in addition to your Member Direct option holdings. If you wish to redeem a term deposit within the Member Direct option before maturity and you meet the eligibility criteria to do so, early redemption costs will apply. See the booklet, *Your Guide to the Member Direct investment option* for more information.

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Member number

## 5. TAX FILE NUMBER NOTIFICATION

**By providing my Tax File Number (TFN) below, I confirm that:**

- I have read the TFN notification information on page 2 and agree to the Trustee (AustralianSuper) using my TFN for the purposes for which it is provided under legislation.
- I understand that if the law changes, the purposes for providing my TFN and the consequences of not providing my TFN may also change.

My Tax File Number is

**No, I do not wish to quote my TFN**

If you do not quote your TFN, any payment paid directly to you will have the maximum tax deducted as required by legislation.

## 6. PROOF OF IDENTITY

**I have attached the relevant proof of identity documents as described on page 2 of this form.**

- I confirm that these documents have been correctly certified.

## 7. DECLARATION

**I have attached the relevant benefit payment identification requirements.**

- I acknowledge that the information provided is true and correct.
- I confirm that I have read the information on privacy on page 2 of this form.
- I understand that the personal information I have provided on this form will be used for the purpose of administering my account.
- If I have elected to redeem holdings in the Member Direct option, I confirm that I have read *Your guide to the AustralianSuper Member Direct investment option*.

**Sign here:**



Date

       

Print full name