



Application for an associate pension* by the former spouse of a DFRDB/DFRB pensioner

Who should use this form?

You should complete this form if your former spouse is receiving a pension from the DFRDB or DFRB and you have been granted a portion of that pension under a Family Law payment split.

When is the pension paid?

The pension becomes payable on the first available pension payday after the later of the operative time or ComSuper receipt of the Family Law Court Order or Superannuation Agreement. The pension is calculated on the basis of a 14 day fortnight.

Who pays the pension?

Payment is made by ComSuper on behalf of the Defence Force Retirement and Death Benefits (DFRDB) Authority.

How is the pension paid?

The pension is paid by direct credit to an approved financial institution (bank, building society, credit union) of your choice. If at any time, after the pension has commenced, you wish to change the institution to which pension is being credited, you only need contact ComSuper by telephoning **1300 001 877**.

Rollover fund nominations

If you are choosing to rollover part of your benefit, it must be paid to a complying superannuation fund, rollover fund, retirement savings account (RSA). We will not deduct tax from any amount rolled over to another fund however, the receiving fund will deduct 15% tax from any untaxed component of the rollover.

You can nominate two rollover funds or RSA's to receive all or part of your lump sum benefit. Complete one nomination if you are going to roll over your entire benefit to one fund. If you are going to split the amount, complete both nominations with details of the second fund.

We will make all rollover cheques payable to your nominated rollover fund(s) send them directly to your nominated fund(s). Please make sure you have the correct postal address of your fund(s).

When completing this section you must include the name and Australian business number (ABN) for the nominated rollover fund or RSA. Providing the Superannuation fund number (SFN) is optional. If you have a membership number for the rollover fund or RSA, please include this number. If you do not have a membership number, please list a Superannuation product identification number (SPIN). You can get these details from the rollover fund or RSA. If you don't include these details, it will result in payment delays of your benefit. Please ensure your nominated rollover account(s) is active and can receive deposits from other superannuation funds. Failure to do so will result in the payment being returned to our office.

Tax file number requirements

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, ComSuper is required to deduct PAYG tax at the top marginal rate plus the Medicare levy from pensions if a person does not provide a tax file number (TFN).

If you have not been issued a TFN you should lodge an application/enquiry form with the Australian Taxation Office (ATO). Forms are available at all tax offices. You must provide proof of identity at the time you lodge the form.

Tax file number declaration form

The information you provide on this form will determine how much tax is deducted from your pension. Please note you can only claim the tax free threshold against one source of income.

Other deductions

Facilities are not available for deductions other than income tax to be made from your pension.

Pension increases

Your pension will be subject to bi-annual adjustment in line with upward movements in the consumer price index (March to September and September to March periods). The increase is payable on the first pension payday in January and July each year. Please contact ComSuper prior to claiming your benefit to obtain the current level of commutation.

When does the pension cease?

Your pension is payable until your death. No reversionary benefits are payable.

How to complete this application

Most questions are self-explanatory. However additional information regarding important or optional questions is provided below.

About yourself:

This segment provides necessary personal details to enable benefits to be paid to you. It is important that you keep us informed of any changes of address or name.

Payment details:

This segment lets you tell us where to pay your pension. The account must be held in your name only or jointly between yourself and one other person.

Privacy

The DFRDB Authority and our administrator, ComSuper, are committed to protecting any information you give us. Your information will be used to send you news about your super and to contact you if we need to in the future.

- Your information will not be used for any other purpose or disclosed to another party, unless:
- you authorise us to do so
- it is required by Law
- it is to an independently commissioned firm 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 this firm, please put a cross in the box at **Question 12**.

The DFRDB is administered by ComSuper. If you need more information or help to complete this application please:

Visit

Unit 4 Cameron Offices
Chandler Street
Belconnen ACT 2617

Phone

1300 001 877
for the cost of a local call

Mail

PO Box 22
Belconnen ACT 2616

Fax

(02) 6272 9618

Email

members@dfldb.gov.au

Internet

www.dfrdb.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.

PART D**Identification requirements**

9. To protect against fraud, safeguard your benefit and comply with the Government's recently introduced Anti-Money Laundering and Counter Terrorism Financing Legislation, we need you to provide documentation to prove your identity. Please be aware that under some circumstances we may request further information from you. If you are unable to provide documentation of the type set out below you should speak to an information officer on **1300 006 727**.

All documents provided to confirm your identity must be certified.

You will need to provide certified copies of

- one document from **column A** in the table below, OR
- one document from **column B** AND one document from **column C**

For example, you could provide a certified copy of your driver's licence (from **column A**) OR a certified copy of your birth certificate AND a certified copy of your tax return with your current residential address.

A	B	C
Driver's licence or permit issued by state or territory or foreign government	Birth certificate or birth extract, issued by Australian or foreign government (either in English or accompanied by English translation prepared by an accredited translator)	Copy of 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 electricity or gas bill with the same address and name as on the application
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
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	Letter from Centrelink or DVA with the same address and name as on the application
	ADF discharge papers or an ADF ID card	

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 G**Member declaration**

11. I declare that:
- I have been advised to read the Product Disclosure Statement package 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 D**; I understand that supplying my tax file number is optional and that if I have not provided my Tax File Number, tax will be deducted at the highest marginal rate;
 - the tax file number I have provided is the same number advised to me by the Australian Taxation Office; and
 - the tax file number 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.

Signature and date

SIGNATURE	

Date signed

D	D	/	M	M	/	Y	Y	Y	Y

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

PART H**Lodgement**

13. Send your completed application and attachments to:
- DFRDB**
PO Box 22
BELCONNEN ACT 2616

ENDFORM

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
- 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

Attachment reference (continued)

- 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

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

DISCLAIMER 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.

The DFRDB is administered by ComSuper

Located at: Unit 4, Cameron Offices,
Chandler St, Belconnen
ACT 2617
Postal Address: DFRDB, PO Box 22,
Belconnen ACT 2616

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mail: members@dfrdb.gov.au
Telephone: 1300 001 677
Fax: (02) 6272 9616
TTY: (02) 6272 9827
