



## Orphan of a Pensioner Benefit Application Form

### Who should use this form?

This form is to be completed by persons who have care, control and custody of the child of a deceased member that they consider is either an 'eligible child' or a 'partially dependent child'.

A separate form is required for each child.

Eligible children over the age of 18 years may apply for a benefit in their own right.

### Who is an eligible child?

An eligible child is a child of the deceased who:

- has not attained age 16, or
- has not attained age 25 and is a full-time student not ordinarily engaged in employment.
- A child of the deceased also includes:
  - an ex-nuptial child, a stepchild, an adopted child, a foster child, or a child within the meaning of the *Family Law Act 1975*, a ward of the deceased person; or
  - a child or ex-nuptial child of the spouse, who was wholly or substantially dependent upon the deceased at the time of death.

*For a full copy of these definitions please contact ComSuper.*

### Entitlement

The calculation of an orphan's pension benefit is based on a fixed component as a fortnightly benefit, PLUS an amount equal to one-eighth of what an eligible spouse would be entitled to. The fixed component is increased each January and July by the Consumer Price Index (CPI).

### When is the pension paid?

Pension is payable on and from the day after the date of the pensioner's death. It is calculated on the basis of a 14 day fortnight and is paid on the alternate Thursday to public service salary paydays.

### Pension increases

The legislation provides for bi-annual increases based on upward movements to the Consumer Price Index. These increases are paid on the first payday in January and July each year. There are proportionate adjustments if pensions have been paid for only part of the preceding six months. DFRDB pension increases are applied only to the Government financed components of the pension.

### When does pension cease?

Pension will cease upon the child reaching age 16 unless they are receiving full-time education, in which case payment will continue until either full-time education ceases or the student attains age 25, whichever occurs first. Student pensions are reviewed at the beginning of each year to establish continuing entitlement. Pension payable in respect of partially dependant children will cease earlier if ordered by the court.

### Tax File Number

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 the child has not been issued a TFN you should lodge an *Australian Taxation Office Application/Enquiry* form with the Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

## **Method of payment**

Pension is paid by direct credit to an approved financial institution (bank, building society, credit union) of your choice within Australia. If at any time, after the pension has commenced, you wish to change the institution to which the pension is being credited, you will need to contact ComSuper by telephoning **1300 001 877**. This must be done at least one week before payday to ensure payment to your new account.

## **Privacy**

The information provided on this form, together with details of benefit entitlements, may be released to other Commonwealth agencies under the provisions of the *Privacy Act 1988*.

ComSuper also monitors and evaluates its performance against the standards set out in the Service Charter and the standards set by the PSS Board. To continually improve our service we have commissioned an independent firm, Orima, to assess our performance against those standards. For this purpose your name, address and telephone number may be passed to Orima to undertake random surveys. These surveys may take the form of a telephone survey or a written request for your feedback, should you choose to participate. The information will not be used for any other purpose and Orima are required to protect all details collected under the provisions of the *Privacy Act 1988*.

## **Need more information?**

Defence Force Retirement and Death Benefits (DFRDB) Scheme 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

### **Mail**

DFRDB Pensions  
Administration Section  
PO Box 22  
Belconnen ACT 2616

### **Email**

members@dfrdb.gov.au  
pensions@dfrdb.gov.au

### **Phone**

**1300 001 877**  
for the cost of a local call

### **Fax**

(02) 6272 9618

### **Internet**

**www.dfrdb.gov.au**

When contacting ComSuper, please remember to quote the reference number of the deceased.

## **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.



## Orphan of a Pensioner Benefit Application Form

**PART A**  
*About yourself*

1. Name:  Mr  Ms  Miss  Mrs  Other

Surname \_\_\_\_\_

Given names \_\_\_\_\_

2. Postal address \_\_\_\_\_

\_\_\_\_\_

Postcode \_\_\_\_\_

3. Residential address \_\_\_\_\_

\_\_\_\_\_

Postcode \_\_\_\_\_

4. Contact phone number(s) Home phone (\_\_\_\_) \_\_\_\_\_

(if convenient) Work phone (\_\_\_\_) \_\_\_\_\_

Mobile phone \_\_\_\_\_

**PART B**  
*About the deceased*

5. Service:  Army  Navy  RAAF

6. Service Number/Employee ID \_\_\_\_\_

7. Surname \_\_\_\_\_

Given names \_\_\_\_\_

**PART B**  
*(continued)*

8. Date of birth: 

day	month	year

.....

9. Date of death: 

day	month	year

.....

**PART C**  
*About the child*

10. Surname \_\_\_\_\_  
Given names \_\_\_\_\_

.....

11. Date of birth: *Include copy of full birth certificate*

day	month	year

.....

12. What is your relationship to the child? \_\_\_\_\_

.....

13. What was the child's relationship to the deceased? \_\_\_\_\_

.....

14. Was the child living with the deceased at the time of death?

Yes - Please complete Question 16

No - Please complete Question 15

.....

15. Was the child wholly or substantially dependent upon the deceased at the time of death?

Yes - Please complete Question 16

No

*Include all details of dependency with the application including any supporting documents you may think relevant, e.g. maintenance agreements.*

.....

16. Is the child aged 16 years or more?

Yes - Please complete Question 17

No - Please Go to Part D

## **PART C** **(continued)**

### 17. Full time study details for child over age 16:

Please provide details of full time student less than age 25 that may be regarded as eligible students and include copies of full birth certificate (not an extract). If duration of course is less than 12 months, please include dates of duration. If course is more than 12 months (eg 4 year Uni course) only provide dates for current year, at the beginning of each year ComSuper sends out an Annual Student Review confirming full time study. This will verify continuation of study.

Name of student \_\_\_\_\_

Name of School/College/University \_\_\_\_\_

Address of School/College/University \_\_\_\_\_

Postcode \_\_\_\_\_

Type of course \_\_\_\_\_

Duration of course from \_\_\_\_\_

| | |

day month year

to \_\_\_\_\_

| | |

day month year

Stamp of School/College/University \_\_\_\_\_

*I certify that this student is undertaking full-time study.*

\_\_\_\_\_  
Principal/Registrar signature

| | |

day month year

## **PART D** **Method of payment**

### 18. Give details of the account you want your benefit paid into.

The account must be in Australia.

Type:  Building Society  Credit Union  Bank

Name of financial institution \_\_\_\_\_

Branch name \_\_\_\_\_

Branch No. (BSB) \_\_\_\_\_

Account No. \_\_\_\_\_

Account held in name(s)  
of (must include your name) \_\_\_\_\_

## **PART E** **Identification** **requirements**

19. 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.**

**Birth certificate or birth extracts are required to support all applications for children's benefits and where the person is over the age of 18 for identity purposes they must also supply a document from column A, column C or photographic ID from the school or college. Where a child is under school age the claimant must also provide a medicare card or other documentation listing both the caregiver and child.**

<b>A</b>	<b>B</b>	<b>C</b>
Driver's licence or permit issued by State or Territory or foreign government	Birth Certificate or Birth Extract, issued by an Australian or foreign Government (either in English or accompanied by English translation prepared by an accredited translator)	Copy of a 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 an electricity or gas bill with the same address and name as on the application
An 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
A 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	A letter from Centrelink or DVA with the same address and name as on the application
	ADF Discharge papers	For a person under the age of 18, a letter from a school principal, within three months of application, stating the name of the student, residential address and period of time the student attended the school

**PART E**  
**(continued)**

All copies of documents provided to MilitarySuper must be certified as true and correct copies of the original by one of the following:

- a legal practitioner enrolled on the roll of a supreme court or the high court of Australia
- a judge or magistrate of a court
- a chief executive officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Justice of the Peace (JP)
- a notary public
- a police officer
- an agent or permanent employee of the Australian Postal Corporation in an office supplying postal services to the public
- an Australian consular officer or an Australian diplomatic officer
- a finance company officer with two or more years of continuous service with one or more Finance Companies
- a person employed by or an authorised representative of the holder of a financial services licence with two or more continuous years of service
- a member of the Institute of Chartered Accountants (ICA), Certified Practising Accountants (CPA Australia) or National Institute of Chartered Accountants (NIA) with two or more years of continuous membership

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:

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## **PART F** **Declaration**

20. I declare that the information entered on this form is true and correct to the best of my knowledge.

Your signature \_\_\_\_\_

Date

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|  
day month year

Section 167 of the Superannuation Act 1948 provides for a penalty of \$2,000 imprisonment for 12 months, or both for a person providing false or misleading information in connection with a benefit.

*Note: Do not wait until you have a copy of the deceased's death certificate before lodging this application. The death certificate can be sent later.*

## **PART G** **The child's Tax File Number**

21. Under the Superannuation Industry (Supervision) Act 1993, we are authorised to collect the child's TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. We may disclose the child's TFN to another superannuation provider if the child's benefits are being transferred, unless you request in writing that it not be disclosed to any other superannuation provider.

It is not an offence not to quote the child's TFN. However, giving us the child's TFN will have the following advantages (which may not otherwise apply):

- other than the tax that may ordinarily apply, no additional tax will be deducted from the child's superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in the child's name.

*Note that the lawful purposes may change in the future as a result of legislative change.*

If you have already provided the child's TFN to ComSuper, you are under no obligation to provide it again in this application.

Child's Tax File Number

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|

Your Tax File Number remains confidential

## **PART H** **Attachments**

22. If you have included some attachments with this application, please tick the appropriate box(es) to ensure the attachments are properly recorded.

- Full birth certificate
- Tax File Number declaration form
- Death certificate
- Certified copies of documents requested to prove your identity
- Other (please specify below)