

Living Super Statement of Dependency



Reversionary beneficiaries

Who should complete this form?

This form should be completed by the person nominated by the Deceased as a Reversionary beneficiary on their Living Super Pension or Transition to Retirement (TTR) account.

Please return to:

Living Super
Reply Paid 93910
MELBOURNE VIC 3001

What is a reversionary death benefit?

When a reversionary nomination was made by the Deceased on their Living Super Pension or TTR account, and we are able to confirm that the nominated beneficiary is a valid "dependant" as outlined by the SIS Act (further details are at the end of this form), ownership of the Deceased's Pension or TTR account will revert to the nominated reversionary once they have provided confirmation of their details and documentation as outlined in this form. If insurance applies on the Deceased's Living Super Pension or TTR account, the Insurer and Trustee of Living Super will consider the payment of any insured lump sum along with any existing pension that was paid to the Deceased. Any insured amount will be put toward the reversionary pension.

Section 1: Deceased member's details

Name	
<input type="text"/>	
Date of Birth	Date of Death
<input type="text"/>	<input type="text"/>
Address	
<input type="text"/>	
Living Super Pension or TTR account number	Client number
<input type="text"/>	<input type="text"/>

Section 2: Your details (the nominated reversionary account recipient)

Existing Client number (if applicable)	Existing Living Super account number (if applicable)
<input type="text"/>	<input type="text"/>
Name	Date of Birth
<input type="text"/>	<input type="text"/>
Postal address	
<input type="text"/>	
Residential address	
<input type="text"/>	
Phone number	Email
<input type="text"/>	<input type="text"/>
Mother's maiden name (security question)	
<input type="text"/>	

To be completed only if you are completing this form on behalf of a minor child

Guardian's name	Date of Birth
<input type="text"/>	<input type="text"/>
Address	
<input type="text"/>	
Phone number	Email
<input type="text"/>	<input type="text"/>

Are you the legal guardian of the above minor? Yes No



Section 3: Required document checklist

- Original Certified Copy** of deceased's Death Certificate (**mandatory**)
- Original Certified Copy** of identification of the deceased
(this may be a copy of a Driver's Licence, Passport or Birth Certificate) (**mandatory**)

Section 4: Confirmation of Dependency

The Trustee can only pay a death benefit as permitted by the Superannuation Industry (Supervision) Act 1993, and the Fund's Trust Deed. These generally restrict the range of potential beneficiaries to people who were a 'dependant' of the deceased member.

In order to process the late members benefit, please confirm that you meet the definition of dependant as defined in the section 'Who are dependants' on page 4 of this form;

Yes, I am a Dependant

No, I am not a Dependant

Section 5: Bank account details – where the reversionary pension is to be paid

Account name

BSB

Note: Existing pension payments will continue to the nominated bank account until we are advised otherwise.

Account number

Section 6: Identification details of proposed beneficiary of pension

If you are already a Living Super pensioner, generally you do not need to provide formal identification evidence, provided your previously provided identification information is still current. Please confirm:

Yes, I am a Living Super pensioner or TTR account holder

No, I am not a Living Super pensioner or TTR account holder

If you answered '**No**' to the above question, then please provide:

i) Original Certified copy of your identification
(this may be a copy of your Passport, Driver's License, or Birth Certificate),

and

ii) Your Tax File Number
(on the enclosed 'Tax File Number declaration form')



Section 7: Statutory Declaration – Statutory Declaration Act 1959 (Cth)

Please complete and sign this in front of an eligible witness

(See next page for list of people eligible to witness Statutory Declarations)

I, _____
Print full name of person making the declaration

of _____
Print your full address

do solemnly and sincerely declare that, to the best of my knowledge, the contents of this Statement of Dependency Form are true and correct.

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the *Statutory Declarations Act 1959*.

Declared at _____
Print details of city where declaration is being signed

In the state/territory of _____
Print details of state or territory where declaration is being signed

on this _____ day of _____ 20 _____ before me,
Day Month Year

Your signature _____
Signature of person making the declaration

Witness' full name: _____
Print full name of witness

Witness' address: _____
Print full address of witness

Witness' signature _____
Signature of witness

Witness' occupation: _____
Occupation of witness

Note 1 A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years – see section 11 of the *Statutory Declarations Act 1959*.

Note 2 Chapter 2 of the *Criminal Code* applies to all offences against the *Statutory Declarations Act 1959* – see section 5A of the *Statutory Declarations Act 1959*.



Statutory Declarations and Original Certified Copies

As part of this Statement of Dependency form, you will need to sign a Statutory Declaration and provide Original Certified Copies of specific documents. An Original Certified Copy is a copy of a document that has been certified as a true and correct copy of the original (all pages). Statutory Declarations and Certified Copies of documents may be witnessed by one of the following

(Note: persons qualified to witness Statutory Declarations and Certified Copies of documents may vary in each state and territory):

- Architect
- Chiropractor
- Dentist
- Financial adviser or financial planner
- A person enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a Legal practitioner
- Medical practitioner
- Midwife
- Migration agent registered under Division 3 of Part 3 of the Migration Act 1958
- Nurse
- Occupational therapist
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trademarks attorney
- Veterinary surgeon
- Accountant who is a fellow of the National Tax Accountants' Association, a member of Chartered Accountants Australia and New Zealand, the Association of Taxation and Management Accountants, CPA Australia, or the Institute of Public Accountants
- Permanent employee with 5 or more years of continuous service or agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- APS employee engaged on an ongoing basis with 5 or more years of continuous service who is not specified in another item of this Part
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank, building society, credit union or finance company officer with 5 or more continuous years of service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Employee of a Commonwealth authority engaged on a permanent basis with 5 or more years of continuous service who is not specified in another item in this Part
- Employee of the Australian Trade and Investment Commission who is in a country or place outside Australia, authorised under paragraph 3(d) of the Consular Fees Act 1955 and exercising the employee's function at that place
- Employee of the Commonwealth who is at a place outside Australia, authorised under paragraph 3(c) of the Consular Fees Act 1955 and exercising the employee's function at that place
- Engineer who is a member of Engineers Australia (other than at the grade of student), a Registered Professional Engineer of Professionals Australia, registered as an engineer under a law of the Commonwealth, a State or Territory, or registered on the National Engineering Register by Engineers Australia
- Holder of a statutory office not specified in another item of this Part
- Judge
- 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 the Australian Defence Force who is an officer, a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 5 or more years of continuous service, or a warrant officer within the meaning of that Act
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Governance Institute of Australia Ltd
- Member of the Parliament of the Commonwealth, a State, a Territory legislature, or a local government authority
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public including a notary public (however described) exercising functions at a place outside the Commonwealth and the external Territories of the Commonwealth
- Permanent employee of a State or Territory, a State or Territory authority, or a local government authority with 5 or more years of continuous service, other than such an employee who is specified in another item of 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 employee of a Commonwealth authority or of a State or Territory
- SES employee of the Commonwealth
- Sheriff or Sheriff's officer
- Teacher employed on a permanent full time or part time basis at a school or tertiary education institution.

If you are outside Australia, documents may only be certified by the following document certifiers:

- A Notary Public, including a notary public (however described) exercising functions at a place outside; a) the Commonwealth; and b) the external Territories of the Commonwealth
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- An authorised staff member of an Australian Embassy, High Commission or Consulate
- An authorised employee of the Australian Trade and Investment Commission, who is: a) in a country or place outside Australia; and b) authorized under paragraph 3(d) of the Consular Fees Act 1955; and c) exercising the employee's function at that place
- An authorised employee of the Commonwealth of Australia, who is: a) in a country or place outside Australia; and b) authorized under paragraph 3(d) of the Consular Fees Act 1955; and c) exercising the employee's function at that place
- A 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

Further information

Claims for death benefits are made at a time when people are upset and usually anxious about their circumstances. The process of claiming a Death benefit can appear complex, particularly if you are unsure about superannuation entitlements. The following pages explain:

- Who is entitled to claim a Death benefit;
- The steps you must go through when making a claim;
- What the trustee of the superannuation fund needs to consider in reviewing a claim; and
- Some of the legal and superannuation terms you may come across.

Who are dependants?

Under the SIS Act, the term 'dependant' generally means one or more of the following people:

- the spouse of the member (including a de facto spouse);
- any child of the member – including any step child, any child recognised by the member as an adopted child and any child of the member born after the member's death;
- any person who the Trustee considers to have been wholly or partially financially dependent on the member at the time of the member's death;
- any person who the Trustee considers to have been in an 'interdependent relationship' with the member at the time of the member's death.

Financial dependency

Being financially dependent on the deceased does not necessarily mean that you depend on them totally for financial support. You may claim as a dependant, even if you were only partially financially dependent on the deceased.

Financial dependency may include a dependency on the deceased for payments of bills, rent, maintenance payments and shared financial commitments such as a mortgage.

Interdependent relationship

Two people will have an interdependent relationship if:

- they have a 'close personal relationship'; and
- they live together; and
- one or each of them provides the other with financial support; and
- one or each of them provides the other with domestic support and personal care.

OR

- they have a 'close personal relationship'; and
- they do not live together, nor provide each other with financial support, nor provide each other with domestic support and personal care because one or both of them suffer from a disability.

OR

- they have a 'close personal relationship'; and
- they live together; and
- one or each of them provides the other with financial support; and
- one or each of them provides the other with support and care of a type and quality normally provided in a close personal relationship, rather than by a mere friend or flatmate.

OR



- they have a 'close personal relationship'; and
- they do not live together, nor provide each other with domestic support and personal care because they are temporarily living apart.

A 'close personal relationship' is one that involves a demonstrated and ongoing commitment to the emotional support and well-being of two parties.

Two persons do not have an interdependent relationship if one of them provides domestic support and personal care to the other:

- under an employment contract or a contract for services; or
- on behalf of another person or organisation such as a government agency, a body corporate or a benevolent or charitable organisation.

Queries

If you have any queries about death benefits you should call our member claims team on (03) 7067 8656, 8:30am-5pm Mon-Fri (Melbourne time) or email us on memberclaims@diversa.com.au.

Completed forms

Please return this completed form to the following address:

Living Super
Reply Paid 93910
Melbourne VIC 3001

For the curious: This information was prepared and sent on behalf of Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153, RSE L0000635, the Trustee of Living Super, a sub-plan of OneSuper ABN 43 905 581 638 (Fund) and the issuer of interests in the Fund. Living Super is a product issued out of the Fund. Insurance cover offered by the Fund is provided by MetLife Insurance Limited ABN 75 004 274 882 AFSL 238096. The information contained above is general advice only and has been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, the appropriateness of the product and read the Product Disclosure Statement and Target Market Determination available at ing.com.au before making any decision to acquire or continue to hold the product. You may also decide to seek independent financial advice before making a decision about the product. ING is a business name of ING Bank (Australia) Limited ABN 24 000 893 292, AFSL 229823.

