

# Information you need to know about your claim for Pension Bonus Bereavement Payment



Pension Bonus Bereavement Payment is a tax free lump sum payment for the surviving partner of a deceased Pension Bonus Scheme member who did not make a successful claim for Age Pension and Pension Bonus before they died.

To qualify, you must meet residence and other requirements. The amount of the payment will depend on the amount of Pension Bonus that would have been paid to your deceased partner had they successfully claimed Age Pension and Pension Bonus before they died.

For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](https://servicessaustralia.gov.au/pensionbonusscheme)

## Important information

Complete the Claim for Pension Bonus Bereavement Payment as at the date of your partner's death. All references to 'your partner' mean 'your deceased partner'.

Generally you must lodge your Pension Bonus Bereavement Payment claim **within 26 weeks** of your partner's death. In special circumstances, we may be able to accept a late claim.

## Online services



Many of our customers find it easier to claim payments and manage their details using their Centrelink online account.

You need a myGov account to link and use your Centrelink online account. If you do not have a myGov account, go to [my.gov.au](https://my.gov.au) and create one. For help, go to [servicessaustralia.gov.au/onlineguides](https://servicessaustralia.gov.au/onlineguides)

## For more information

Go to [servicessaustralia.gov.au/pensionbonusscheme](https://servicessaustralia.gov.au/pensionbonusscheme) or visit one of our service centres.

Call us on **132 300**.

For more information about how to lodge documents online, go to [servicessaustralia.gov.au/centrelinkuploaddocs](https://servicessaustralia.gov.au/centrelinkuploaddocs)



### Help in your language

We can translate documents you need for your claim or payment for free.

To speak to us in your language, call **131 202**.

Call charges may apply.



### Telephone Typewriter

If you have a hearing or speech impairment, you can contact the **TTY service** Freecall™ **1800 810 586**. A TTY phone is required to use this service.

If you want to find payments and services relevant to your circumstances, go to [servicessaustralia.gov.au/paymentfinder](https://servicessaustralia.gov.au/paymentfinder)

**Keep these Notes (pages 1 to 10) for your information.**

## Information in other languages

### English

To speak to us in your language, call **131 202**. Call charges may apply. For information in your language about our payments and services, go to [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Arabic

للتحدث إلينا بلغتك، اتصل على الرقم **131 202**. قد تفرض الرسوم على هذا الاتصال. للحصول على معلومات بلغتك عن المدفوعات والخدمات التي نقدمها، اطّلع على الرابط [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Assyrian

لەتەمزەین بێج تەئێتن دکتەهه،، مەهه، بکە دکتەهه، بێتێتن **131 202**. تەئێتن دکتەهه، تە مەتێن دکتەهه تێن. لەتێتن بێج تەئێتن دکتەهه، تە مەتێن دکتەهه،، دسەتم، [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage) دکتەهه

### Chaldean

لەتەمزەین بێج تەئێتن دکتەهه،، مەهه، بکە دکتەهه، بێتێتن **131 202**. تەئێتن دکتەهه، تە مەتێن دکتەهه تێن. لەتێتن بێج تەئێتن دکتەهه، تە مەتێن دکتەهه،، دسەتم، [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage) دکتەهه

### Chinese (Simplified)

如果您希望用自己的语言与我们交谈，请致电 **131 202**（可能需要收话费）。获取有关我们提供的各项福利金以及相关服务的中文资料可访问 [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Croatian

Da razgovarate s nama na vašem jeziku, pozovite **131 202**. Pozivi se mogu naplaćivati. Za informacije o našim isplatama i uslugama na vašem jeziku, pogledajte [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Greek

Για να μας μιλήσετε στη γλώσσα σας, καλέστε το **131 202**. Μπορεί να ισχύουν χρεώσεις κλήσης. Για πληροφορίες στη γλώσσα σας σχετικά με τις πληρωμές και τις υπηρεσίες μας, πηγαίνετε στο [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Italian

Per parlare con noi nella tua lingua, chiama il numero **131 202**. La chiamata potrebbe essere soggetta a tariffa. Per informazioni nella tua lingua in merito a sussidi e servizi, visita il sito [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Khmer

ដើម្បីនិយាយមកកាន់យើងខ្ញុំជាភាសាលោកអ្នក សូមទូរសព្ទទៅលេខ **131 202**។ លោកអ្នកអាចបង់ថ្លៃទូរសព្ទ។ ដើម្បីទទួលព័ត៌មានជាភាសាលោកអ្នកអំពីប្រាក់ផ្តល់និងសេវារបស់យើងខ្ញុំ សូមបើកមើល [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Korean

귀하의 언어로 통화하기를 원하시면, **131 202** 번으로 전화하십시오. 통화료가 부과될 수 있습니다. 귀하의 언어로 저희가 제공하는 급부금 및 서비스에 대한 정보를 찾아보기 원하시면, [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage) 에 방문하십시오.

### Macedonian

За да зборувате со нас на македонски јазик, јавете се на **131 202**. Повиците може да се наплаќаат. За информации на македонски јазик за нашите исплати и услуги, отидете на [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Maltese

Biex tkellimna bil-lingwa tiegħek, ċempel **131 202**. Jista' jkollok thallas tat-telefonata. Għal tagħrif fil-lingwa tiegħek dwar il-pagamenti u s-servizzi tagħna, mur fuq [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Polish

By porozmawiać z nami w swoim języku, zadzwoń pod numer **131 202**. Mogą obowiązywać opłaty za połączenie. W celu uzyskania informacji w twoim języku na temat płatności i usług odwiedź stronę internetową [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Portuguese

Para falar conosco na sua língua ligue para o **131 202**. Tarifas poderão ser aplicáveis. Para informações sobre os nossos pagamentos e serviços na sua língua, visite [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Russian

Чтобы проконсультироваться с нами на родном языке, позвоните по номеру **131 202**. Звонок может быть платным. За сведениями о наших выплатах и услугах на вашем языке обращайтесь по адресу [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Serbian

Da razgovarate sa nama na vašem jeziku, pozovite **131 202**. Pozivi mogu da se naplaćuju. Za informacije o našim isplatama i uslugama na vašem jeziku, pogledajte [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Spanish

Para hablarnos en español llame al **131 202**. Puede que se le cobre la llamada. Obtenga información en español sobre nuestros pagos y servicios en [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Turkish

Bizimle kendi dilinizde konuşmak için **131 202** numaralı telefonu arayın. Arama ücreti uygulanabilir. Ücretlerimiz ve hizmetlerimiz hakkında kendi dilinizde bilgi için şu siteye girin: [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

### Vietnamese

Muốn nói chuyện với chúng tôi bằng ngôn ngữ của mình, quý vị hãy gọi số **131 202**. Có thể bị tính cước gọi. Muốn biết thông tin bằng ngôn ngữ của mình về các khoản trợ cấp và dịch vụ của chúng tôi, quý vị hãy truy cập [servicesaustralia.gov.au/yourlanguage](https://servicesaustralia.gov.au/yourlanguage)

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# Pension Bonus Bereavement Payment

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## Eligibility

To qualify for Pension Bonus Bereavement Payment, your partner must:

- have died on or after 1 January 2008
- have been a registered member of the Pension Bonus Scheme
- have accrued at least 1 full year bonus period
- not have made a successful claim for Age Pension and Pension Bonus before they died.

In addition, you and your partner must also meet the residence requirements. We will work out how much Pension Bonus Bereavement Payment is payable. This depends on your and your partner's combined income and assets and other circumstances immediately before they died.

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## Age Pension age for Pension Bonus

Use the table below to help you work out when your partner met the age requirements for the Pension Bonus Scheme – see table below:

Born	Women eligible for Age Pension at age	Men eligible for Age Pension at age
Before 1 July 1935	60	65
1 July 1935 to 31 December 1936	60 1/2	65
1 January 1937 to 30 June 1938	61	65
1 July 1938 to 31 December 1939	61 1/2	65
1 January 1940 to 30 June 1941	62	65
1 July 1941 to 31 December 1942	62 1/2	65
1 January 1943 to 30 June 1944	63	65
1 July 1944 to 31 December 1945	63 1/2	65

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## Income support payments from Centrelink or the Department of Veterans' Affairs

You are disqualified from receiving Pension Bonus if you receive any of the payments listed at question 4 from Centrelink or the Department of Veterans' Affairs after you qualified for Age Pension. If your partner had received one of these payments, this would disqualify you from receiving a Pension Bonus Bereavement Payment. In some cases, if your partner received Special Benefit beyond Age Pension age (see table above) you may still be able to qualify for Pension Bonus Bereavement Payment.

If you are not sure if your partner received Special Benefit after Age Pension age, go to [servicesaustralia.gov.au/specialbenefit](http://servicesaustralia.gov.au/specialbenefit) or call us on **132 300**.

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## Australian residence requirements for you

To be eligible for Pension Bonus Bereavement Payment, you must be an Australian resident.

You are an Australian resident (as defined by the *Social Security Act 1991*) if you are living in Australia and you are one of the following:

- an Australian citizen
- the holder of a permanent visa
- a protected special category visa holder, that is a person who arrived on a New Zealand passport and who was in Australia on 26 February 2001, or for 12 months in the 2 years immediately before this date, or was assessed as 'protected' before 26 February 2004.

### Australian residence requirements for your deceased partner

To claim Pension Bonus Bereavement Payment, your partner must have been an Australian resident at the time of their death. An Australian resident (as defined by the *Social Security Act 1991*) is a person who lives permanently in Australia and is one of the following:

- an Australian citizen
- the holder of a permanent visa
- a protected special category visa holder, that is a person who arrived on a New Zealand passport and who was in Australia on 26 February 2001, or for 12 months in the 2 years immediately before this date, or was assessed as 'protected' before 26 February 2004.

For you to qualify for a Pension Bonus Bereavement Payment, your partner must have lived in Australia, as an Australian resident for either:

- 10 years continuously
- at least 5 years continuously at any time and more than 10 years in total, or
- 104 weeks immediately before their death, for a woman who was widowed while both she and her partner were Australian residents.

If your partner did not meet the above requirements, you may also qualify for a Pension Bonus Bereavement Payment if your partner was either:

- a refugee on arrival in Australia, or
- in receipt of Widow Allowance, Partner Allowance, Widow B Pension or Mature Age Allowance when they turned Age Pension age.

Check with us if you are not sure about the residence requirements for yourself or your partner.

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### International social security agreements

Australia has international social security agreements with a number of countries. Agreements may help a person to receive Age Pension even if they are not an Australian resident and living in Australia, and/or if they do not meet the minimum Australian residence period to qualify.

Your partner may have used an international social security agreement to help them meet residence requirements when they registered in the Pension Bonus Scheme. You cannot be paid a Pension Bonus Bereavement Payment if use of an international social security agreement is required to meet your partner's residence requirements when claiming your bonus.

For more information, go to [servicessaustralia.gov.au/issa](http://servicessaustralia.gov.au/issa)

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### Income from countries other than Australia

For Australian social security purposes, income from any source in a country other than Australia is generally assessable under the income test. Income may be in the form of investments, pensions, superannuation like payments or derived from real estate.

Pensions from a country with which Australia has a social security agreement may be treated differently, for example, directly deducted on a dollar for dollar basis and some pensions, such as restitution payments from certain countries, may be exempt from the income test.

The gross rate of income is assessed, that is, the amount before any bank charges, health insurance or tax deductions. The foreign currency amount is converted to Australian dollars using a commercial exchange rate which is updated automatically each month. To find out the current exchange rates we use, call Freecall™ **1800 050 041**.

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### Income and assets

How much payment you will receive will depend on your circumstances and your and your partner's income and assets immediately before they died.

We calculate the amount that would have been paid to your partner if they had lodged a claim for Age Pension and Pension Bonus before they died. An income and assets test is applied and the test giving the lower rate of payment is the one used to pay Pension Bonus Bereavement Payment.

### The income test

Income may **include**:

- deemed income from financial assets
- net income from business, including farms if not related to gainful work
- family trust distributions or dividends from private company shares
- income attributable to the controllers of a private trust or private company
- income from rental property
- income from a life interest
- income from boarders and lodgers (other than immediate family)
- superannuation and pensions from countries other than Australia
- income from income stream products, such as superannuation pensions and annuities.

Your rental income may be exempt if you and/or your partner entered an aged care home, paid an accommodation bond by periodic instalment and rented out the home you left to enter care.

For Pension Bonus Bereavement Payment, income does **not include**:

- funding from the National Disability Insurance Scheme
- salary, wages, commissions and employment related fringe benefits
- leave payments paid by the employer (sick leave, recreation leave, carer's leave, long service leave)
- payments from the employer in relation to the termination of their employment (redundancy, golden handshake)
- periodic compensation payments
- business income related to gainful work.

Income from work that does not meet the definition of 'gainful work', such as the management of family investments, is not disregarded from the means test in calculating Pension Bonus Bereavement Payment.

For more information, go to [servicessaustralia.gov.au/income](https://servicessaustralia.gov.au/income)

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### Compensation

#### When calculating a Pension Bonus Bereavement Payment

For the purpose of calculating a Pension Bonus Bereavement Payment, we do not include your regular compensation payments amounts received by you and/or your partner. However, if you and/or your partner received regular payments of compensation or a compensation lump sum during the period that a person is a registered member of the Pension Bonus Scheme, that period of time can preclude registered members from accruing bonus periods and they become a non-accruing member.

During a non-accruing period, a registered Pension Bonus Scheme member retains membership of the scheme but does not accrue bonus periods. The time spent in a non-accruing period is not counted as time that the person deferred claiming Age Pension if the member lodged a claim for Age Pension.

For more information about membership, go to [servicessaustralia.gov.au/pensionbonusscheme](https://servicessaustralia.gov.au/pensionbonusscheme)

### The assets test

Most things you and/or your partner owned have a value and can be counted as assets. This includes assets held outside Australia.

For the purpose of calculating your payment, the value of your assets is what you would get for them if you sold them at market value.

Generally, any debt owing on an asset is deducted from the value of the asset.

Assets may **include**:

- rental properties, farms, second or holiday houses
- cars, caravans, boats or trailers
- home contents and personal effects, including antiques or other collectables
- the market or trade value of all savings and investments, including certain funeral bonds
- loans you have made to other people, family trusts and companies
- value of most income stream products
- business assets
- interest in a private trust or private company
- superannuation investments held by people over Age Pension age
- licences (for example, fishing or taxi)
- surrender value of life insurance policies
- any assets given away or sold for less than their market value within the last 5 years.

The following assets are **not included**:

- your principal family home (and up to 2 hectares of privately used surrounding land that is on the same title), and any permanent fixtures such as wall-to-wall carpet and wall heaters
- some income stream products
- cemetery plots and pre-paid funeral expenses
- any property or monies left to you in an estate which you are not yet able to receive, generally for a period up to 12 months
- accommodation bonds paid to an aged care home or on entry to residential aged care
- aids for people with a disability
- monies received from the National Disability Insurance Scheme to provide for the needs of people with a disability
- most compensation or insurance payments for loss or damage to buildings or personal effects
- any life interest, reversionary interest, remainder interest or contingent interest unless it was created by you, your partner or at the time of death of your partner
- assets up to a certain limit held in a Special Disability Trust for an immediate family member.

For more information, go to [servicesaustralia.gov.au/assets](https://servicesaustralia.gov.au/assets)



### Deeming

Deeming is a simple set of social security rules used to assess income from financial assets.

Under these rules we assume financial assets are earning a certain amount of income, regardless of the income they actually earn.

Financial assets **include**:

- bank, building society and credit union accounts
- term deposits and debentures
- friendly society bonds
- managed investments (for example, property trusts)
- listed shares and securities
- shares in unlisted public companies
- gold and other bullion
- superannuation investments held by people over Age Pension age
- short-term asset tested income streams
- account-based income streams (for example, account-based pensions and account-based annuities) purchased from 1 January 2015 and some purchased before 1 January 2015
- loans, including those to family members, family trusts and private companies
- gifts of money or other assets over the allowable amount.

If the actual income you and/or your partner received from investments was more than the deemed income, the extra income is not counted when assessing the amount of payment.

The deemed income is added to any income you and/or your partner had from other sources. Your total income is then used to work out how much you can be paid.

For more information, go to [servicessaustralia.gov.au/deeming](https://servicessaustralia.gov.au/deeming)



## Information for surviving partner

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### Age Pension (Blind)

If your partner was permanently blind, there is no income and assets test. You will still have to tell us if they:

- received compensation payments
- received Self-Employment Allowance
- changed relationship status
- left Australia temporarily or permanently.

### Claiming payments in your own right

Your claim for Pension Bonus Bereavement Payment does not affect your eligibility to claim the Pension Bonus in your own right. If you are a current registered member of the Pension Bonus Scheme, you may wish to claim Age Pension and the Pension Bonus now. You may also choose to continue in the scheme but you would need to meet the work test requirements and other eligibility criteria to do so.

For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](https://servicessaustralia.gov.au/pensionbonusscheme)

## Someone to deal with us on your behalf

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You can choose another person or organisation to deal with us on your behalf for your Centrelink payments and services.

You can authorise them to enquire, act or get payments for you.

If you want someone to deal with us on your behalf, complete the **Authorising a person or organisation to enquire or act on your behalf (SS313)** form.

If you do not have this form, or want more information, go to [servicessaustralia.gov.au/nominees](https://servicessaustralia.gov.au/nominees)

## Definition of a partner

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You have a partner if we consider you a member of a couple. We consider you a member of a couple if you are either:

- married
- in a registered relationship
- in a de facto relationship.

A registered relationship is where your relationship is registered under a law of a state or territory. A de facto relationship is where you and your partner are in a relationship similar to a married couple but are not married or in a registered relationship.

We may still consider you a member of a couple if you are not physically living with your partner. For example, your partner may fly-in fly-out or live away for work, like military or oil rig workers.

For more information, go to [servicessaustralia.gov.au/moc](https://servicessaustralia.gov.au/moc)

## Other help

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If you receive Pension Bonus Bereavement Payment, there is additional help you may be eligible for.

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### **Community Engagement Officers**

These officers can help you:

- manage your income support and other business with us
- link with government and community services for assistance and other support.

They provide Centrelink services in locations like mental health facilities, general crisis or support services, specialist accommodation services, youth services, drug and alcohol services, family and domestic violence services, and organised meeting places.

For more information, go to [servicesaustralia.gov.au/communityofficer](https://servicesaustralia.gov.au/communityofficer)

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### **Financial Information Service Officers**

Our officers can help you:

- make informed financial decisions
- understand the results of your decisions in the short and long term
- prepare for retirement, even while you are still working
- take control of your finances to increase lifestyle choices.

For more information, go to [servicesaustralia.gov.au/fis](https://servicesaustralia.gov.au/fis)

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### **Indigenous Services Officers**

These officers are located in some of our service centres. We also have interpreters who speak Aboriginal or Torres Strait Islander languages and teams who visit and help remote communities.

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### **Social Workers**

We have professional social workers in our service centres and smart centres throughout Australia. Social workers can offer you personal counselling and support in difficult times, such as domestic and family violence, severe financial hardship, homelessness, loss and bereavement. They can refer you to other services and programs like housing, health, emergency relief, legal and/or counselling services and support groups.

For more information, go to [servicesaustralia.gov.au/socialwork](https://servicesaustralia.gov.au/socialwork)

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**Keep these Notes (pages 1 to 10) for your information.**

# Claim for Pension Bonus Bereavement Payment (SA388)

## When to use this form



Use this form to claim Pension Bonus Bereavement Payment. This is a tax free lump sum payment for the surviving partner of a Pension Bonus Scheme member who died before claiming their Pension Bonus. Conditions apply.

## What you may need to provide

You may need to provide identity documents. For a list of acceptable documents, go to [servicessaustralia.gov.au/identity](https://servicessaustralia.gov.au/identity)

## Important information

You must return **all** supporting documents at the same time you lodge this claim form. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

### Filling in this form

You can complete this form on your computer using Adobe Acrobat Reader, and some browsers, or you can print it.

If you have a printed form:

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this  Go to 1 skip to the question number shown.

1 Was your partner a registered member of the Pension Bonus Scheme?

No   **You are not eligible for the Pension Bonus Bereavement Payment.**

Yes  Go to next question

2 Was your partner registered in the Pension Bonus Scheme for more than 12 months after reaching Age Pension age?

No   **You are not eligible for the Pension Bonus Bereavement Payment.**

Yes  Go to next question

3 Was your partner previously paid a Pension Bonus by Centrelink or the Department of Veterans' Affairs?

No  Go to next question

Yes   **You are not eligible for the Pension Bonus Bereavement Payment.**

4 Did your partner receive any of the following income support payments from Centrelink or the Department of Veterans' Affairs (DVA) since qualifying for Age Pension?

Income support payments include:

- Age Pension
- Austudy
- Bereavement Allowance
- DVA Age Service Pension
- DVA Invalidation Service Pension
- DVA Income Support Supplement
- Disability Support Pension
- Farm Household Allowance
- Parenting Payment Partnered
- Parenting Payment Single
- Partner Allowance
- Special Benefit
- Special Needs Pension
- Widow Allowance
- Widow B Pension
- Wife Pension.

For more information, see the **Notes**.

No  Go to next question

Yes   **You are not eligible for the Pension Bonus Bereavement Payment.**

5 Do you need an interpreter?

Available in international, Indigenous, Auslan and other sign languages.

No  Go to 8

Yes  Go to next question

6 What is your preferred spoken language?

7 What is your preferred written language?

8 Your Customer Reference Number (if known)



CLK0SA388 2212

## You

9 Your name

Mr  Mrs  Miss  Ms  Mx  Other

First given name

Second given name

10 Your date of birth (DD MM YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

11 Have you been known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

## Your deceased partner

9 Your partner's name

Mr  Mrs  Miss  Ms  Mx  Other

Family name

First given name

Second given name

10 Your partner's date of birth (DD MM YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Your partner's date of death (DD MM YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------



Provide proof of your **partner's date of birth** and **date of death**.

Acceptable documents are:

- Death Certificate (this can be used for both date of birth and date of death)
- Letter from Funeral Director
- Birth Certificate
- Birth Extract
- Passport
- Citizenship Certificate.

Copies are acceptable.

11 Was your partner known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.



## You

- 19 What country are you currently living in?

This is the country where you normally live on a long term basis.

Australia  Go to next question

Other  Country where you live

- 20 Have you **ever** travelled outside Australia, including short trips and holidays?

This question will help us to verify your Australian residence.

No  Go to next question

Yes  Give details below


Year you last entered Australia

Passport number

Country of issue

- 21 Are you an Australian citizen **who was born in Australia**?

No

 You will need to provide proof of your Australian residence status (for example, **citizenship papers, passport or other documentation**).

▶ Go to next question

Yes  Go to 30

- 22 What is your country of birth?

- 23 What is your country of citizenship?

Australia  Date citizenship granted (DD MM YYYY)

▶ Go to 30

Other  Give details below

Country of citizenship

Date citizenship granted (DD MM YYYY)

## Your deceased partner

- 19 What country did your partner live in at the time of their death?

This is the country where your partner normally lived on a long term basis.

Australia  Go to next question

Other  Country where they lived

- 20 Had your partner **ever** travelled outside Australia, including short trips and holidays?

This question will help us to verify your partner's Australian residence.

No  Go to next question

Yes  Give details below


Year your partner last entered Australia

Passport number

Country of issue

- 21 Was your partner an Australian citizen **who was born in Australia**?

No

 You will need to provide proof of your partner's Australian residence status (for example, **citizenship papers, passport or other documentation**).

▶ Go to next question

Yes  Go to 29

- 22 What was your partner's country of birth?

- 23 What was your partner's country of citizenship?

Australia  Date citizenship granted (DD MM YYYY)

▶ Go to 29

Other  Give details below

Country of citizenship

Date citizenship granted (DD MM YYYY)



## You

24 What type of visa did you arrive on?

Permanent  Go to next question

Temporary  Go to next question

New Zealand passport (Special Category visa)  **Go to 27**

Not sure  **Go to 27**

25 Your visa details on arrival

Visa subclass  Date visa granted (DD MM YYYY)

27 When did you most recently start living in Australia?

(DD MM YYYY)

28 Did you start living in Australia before 1965?

No  Go to next question

Yes  Give details below

Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

## Your deceased partner

24 What type of visa did your partner arrive on?

Permanent  Go to next question

Temporary  Go to next question

New Zealand passport (Special Category visa)  **Go to 26**

Not sure  **Go to 26**

25 Your partner's visa details on arrival

Visa subclass  Date visa granted (DD MM YYYY)

26 Did your partner's visa change after they arrived in Australia?

No  Go to next question

Yes  Most recent visa details

Visa subclass  Date visa granted (DD MM YYYY)

27 When did your partner most recently start living in Australia?

(DD MM YYYY)

28 Did your partner start living in Australia before 1965?

No  Go to next question

Yes  Give details below

Name of the ship or airline on which they arrived

Name of the place where they first arrived/disembarked

What was their name when they first arrived in Australia?

**29 Read this before answering the following question.**

We need to know if your partner had lived in any countries other than Australia. 'Lived' means where your partner/your partner's family made their home or spent a long period of time – it does not include places they visited for a holiday.

Did your partner **ever** live outside Australia for any period?

No  **Go to next question**

Yes  List **all** countries they had lived in since birth and the date they started living in each country.

**Include** when they started living in **Australia**.

**Do not include** short trips or holidays.

**1** Country

Date from (DD MM YYYY)

**2** Country

Date from (DD MM YYYY)

**3** Country

Date from (DD MM YYYY)

If you need more space, provide a separate sheet with details.

**30** Where do you want your payment made?

The account must be in your name. A joint account is acceptable.  
Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

**31** Read this before answering the following questions.

You are not breaking the law if you do not give us your tax file number, but if you do not provide it to us, or authorise us to get it from the Australian Taxation Office, you may not be paid.

In giving us your tax file number in relation to this claim you authorise us to use your tax file number for other social security payments and services in future where necessary.

Have you given us your tax file number before?

No  Go to next question

Not sure  Go to next question

Yes  **Go to 33**

**32** Do you have a tax file number?

No  Call us on **132 300**.

Yes  Your tax file number

**33** Did your partner's relationship status change since their Pension Bonus Scheme registration date?

No  **Go to 35**

Yes  Go to next question

**34** List all changes in your partner's relationship status since their Pension Bonus Scheme registration date.

**1** Relationship status

Date from (DD MM YYYY)

Partner's name (when applicable)

**2** Relationship status

Date from (DD MM YYYY)

Partner's name (when applicable)

**3** Relationship status

Date from (DD MM YYYY)

Partner's name (when applicable)

If your partner had more than 3 relationship status changes since their registration date, provide a separate sheet with details.

**35** Were you living in the same home as your partner at the time of their death?

No  Go to next question

Yes  **Go to 38**

**36** Why were you not living with your partner at the time of their death?

Partner's illness

Your illness

Partner in prison

Partner's employment

Other  Give details below

**37** Period not living with your partner

From (DD MM YYYY)

To (DD MM YYYY)

**Complete the following details as at the date of your partner's death.**

**38** Which of the following best describes where you and your partner lived?

In a place where you (and/or your partner) pay private rent – this includes when you live in a caravan park and pay site fees or live on a vessel and pay mooring fees  **Go to 52**

In a home you (and/or your partner) own or you own jointly with another person – this can include:  
 • paying it off (mortgage)  
 • a caravan, mobile home or boat  **Go to 49**

In a home owned by:  
 • a company in which you (and/or your partner) are a shareholder or director  
 • a trust in which you (and/or your partner) or a member of your family are a potential beneficiary or are named in the trust deed  **Go to 49**

In an aged care home or nursing home  **Go to 52**

In a retirement village  **Go to 39**

In accommodation which you (and/or your partner) had the right to use for life  **Go to 43**

Other (for example, this could be where you (and/or your partner) did not have a fixed address)  Give details below

.....

.....

**Go to 52**

**39** What date did you (and/or your partner) move into the retirement village?

**You**  
   (DD MM YYYY)

**Your partner**  
   (DD MM YYYY)

**40** Did you (and/or your partner) pay an entry contribution?

Your entry contribution may have been a donation, a loan or some type of payment that may be repayable to you in whole or in part, if you leave. An entry contribution does not include gifts or loans above the amount you had to pay for the right to your accommodation.

No  **Go to next question**

Yes  Amount of entry contribution

\$

Provide a copy of the signed contract or agreement.

**41** Did you (and/or your partner) make a gift and/or loan in addition to the entry contribution?

No  **Go to 52**

Yes  **Go to next question**

**42** What was the additional amount paid as a gift and/or loan?

Amount of gift  
 \$

Amount of loan  
 \$

**Go to 52**

**43** Did you (and/or your partner) pay any money or transfer any assets in return for this right to accommodation for life?

No  **Go to next question**

Yes  **Go to 45**

**44** Which option describes how you (and/or your partner) obtained a life interest in a home without any exchange of money or transfer of assets?

Inherited the life interest  **Go to 52**

A formal agreement documenting the life interest  **Go to 52**

An informal agreement, no rent paid  **Go to 52**

An informal agreement to live at a child's home and pay rent  **Go to 52**

Other  Give details below

.....

.....

**Go to 52**




**Complete the following details as at the date of your partner's death.**

**54** Was your partner permanently blind?

No  **Go to 56**

Yes

 Provide a document that verifies your partner was permanently blind. An acceptable document is a letter from their Ophthalmologist or Optometrist.

A copy is acceptable.

**or**


You will need to complete and return the **Request for Ophthalmologist/Optometrist Report (SA013)** form for your deceased partner.

If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

**55** Were you (and/or your partner) receiving any payment from the New Zealand Government?

No  **Go to next question**

Yes

 Provide a letter or document which gives the reference number and details for each payment.

A copy is acceptable.

**56** Read this before answering the following question.

The **market value** of an item is what you would get if you sold it. It is not the replacement or insured value.

**Include:**

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use and hobby collections (for example, stamps, coins).

**Do not include:**

- fixtures such as stoves and built-in items.

Do you want to provide an estimate of the market value of your and your partner's household contents and personal effects?

No  We will assume a value of \$10,000

**Go to next question**

Yes  What is your estimate of the market value of your and your partner's household contents and personal effects as at the date of death of your partner?

\$

**57** Did you (and/or your partner) have any motor vehicles/boats/caravans or trailers?

No  **Go to next question**

Yes  Give details below

<b>1</b> Type of asset (for example, car)	Make (for example, Ford)
<input type="text"/>	<input type="text"/>
Model (for example, Focus)	Year
<input type="text"/>	<input type="text"/>
Current market value	Amount owed
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b> Type of asset (for example, caravan)	Make (for example, Jayco)
<input type="text"/>	<input type="text"/>
Model (for example, Heritage)	Year
<input type="text"/>	<input type="text"/>
Current market value	Amount owed
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) had more than 2 motor vehicles/boats/caravans or trailers, provide a separate sheet with details.

**58** What was the total market value of your and your partner's combined financial investments?

**Include:**

- bank, building society, credit union accounts, term deposits
- cash, gold bullion
- bonds, debentures, unsecured notes
- money you have loaned to another person (including relatives) or organisations or trusts
- investments in superannuation/rollover funds
- managed investments (including property, equity, cash or mortgage trusts, insurance bonds, or friendly society bonds)
- shares in listed or unlisted public companies.

**Do not include:**

- your superannuation investments if you were under Age Pension age at the date of your partner's death
- an account used exclusively for funding from the National Disability Insurance Scheme.

\$

**59 Read this before answering the following question.**

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a retirement savings account
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF).


Types of income streams **include:**

- account-based pension (also known as allocated pension)
- market-linked pension (also known as term allocated pension)
- annuities
- defined benefit pension (for example, ComSuper pension, State Super pension)
- superannuation pension (non-defined benefit).

Did you (and/or your partner) receive income from any income stream products?

No  Go to next question

Yes  Give details below

 You will need to complete and return a **Details of income stream product (SA330)** form or a similar schedule, for each income stream product. The form or similar schedule must be completed by the product provider or the trustee of the Self Managed Superannuation Fund (SMSF) or Small APRA Fund (SAF) or the SMSF administrator.  
If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**1** Name of product provider/SMSF/SAF

Type of income stream      Product reference number

Commencement date (DD MM YYYY)

 /  / 

Owned by: You  Your partner

**2** Name of product provider/SMSF/SAF

Type of income stream      Product reference number

Commencement date (DD MM YYYY)

 /  / 

Owned by: You  Your partner

If you (and/or your partner) had more than 2 income streams products, provide a separate sheet with details.

**60** Did you (and/or your partner) receive payments from **outside Australia?**


**Include:**

- pensions from other countries
- benefits
- allowances
- superannuation
- compensation, and
- war related payments.

You must include details of pensions, allowances and other payments even if:

- they are not taxable in the country of payment, and/or
- you have or had arranged for your payment to be made to a third party.

No  Go to next question

Yes   Provide a document from the issuing authority or agency which gives details including the amount in the foreign currency (for example, latest pension certificate) for each payment.  
Copies are acceptable.

**1** Type of payment

Country which paid it?

Currency of payment

Amount of payment in foreign currency (before tax and other deductions)

**2** Type of payment

Country which paid it?

Currency of payment

Amount of payment in foreign currency (before tax and other deductions)

If you (and/or your partner) had more than 2 payments from outside Australia, provide a separate sheet with details.



61 Did you (and/or your partner) receive any payments that you have not already told us about on this form?


**Include:**

- other Australian Government payments (for example, Department of Veterans' Affairs)
- life interests
- other payments from outside Australia
- money from a Home Equity Conversion scheme
- income from boarders or lodgers
- other income.

**Do not include** funding received from the National Disability Insurance Scheme.

No  Go to next question

Yes  Give details below

 Provide a copy of the most recent statement or certificate that gives details for each type of payment.

1 Type of payment

Amount per fortnight

2 Type of payment

Amount per fortnight

3 Type of payment

Amount per fortnight

If you (and/or your partner) received more than 3 types of payments, provide a separate sheet with details.

62 Were you (and/or your partner) involved in any type of business?

**Include:**

- farming
- self-employed
- sole trader
- partnership
- sub-contractor.

No  Go to next question

Yes   You will need to complete and provide a **Business details (Mod F)** form. If the business owns real estate you will also need to complete and provide a **Real estate details (Mod R)** form for each property.  
If you do not have these forms, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

63 Read this before answering the following questions.

You (and/or your partner) may be, or have been:

- a trustee
- an appointor
- a beneficiary

of a trust that has not been vested (that is, a trust that has ceased),

**or have:**

- made a loan to a private trust
- made a gift of cash, assets, or private property to a private trust in the last 5 years
- relinquished control of a private trust in the last 5 years
- a private annuity
- a life interest
- an interest in a deceased estate.

A private trust includes a non-complying Self Managed Superannuation Fund or a non-complying Small APRA Fund.

Are you or have you (and/or your partner) been involved in a private trust in any of the ways detailed above?

No  Go to 65

Yes  Go to next question

64 Is the private trust a Special Disability Trust (SDT)?

No   You will need to complete and provide a **Private Trust (Mod PT)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

Yes   You will need to complete and provide a **Special Disability Trust (Mod SDT)** form if this has not already been done. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

65 Read this before answering the following questions.

You (and/or your partner) may be, or have been in the last 5 years:

- a director of a company that is still registered
- a shareholder of a company that is still registered

**or have:**

- made a loan to a private company
- transferred shares in a private company
- made a gift of cash, assets or property to a private company.

Are you or have you (and/or your partner) been involved with a private company in any of the ways detailed above?

No  Go to next question

Yes   You will need to complete and provide a **Private Company (Mod PC)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**66** Did you (and/or your partner) own any other assets (in or outside Australia) that you have not already told us about on this form?

**Include:**

- taxi plates
- time share
- racehorses
- greyhounds
- travellers cheques
- cyber currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting).

**Do not include** an account used exclusively for funding from the National Disability Insurance Scheme.

No  ► *Go to next question*

Yes  ► *Give details below*

**1** Description of asset

Current market value	Balance of loan(s) taken to purchase
<input type="text"/>	<input type="text"/>
Currency if not AUD	<input type="text"/>

**2** Description of asset

Current market value	Balance of loan(s) taken to purchase
<input type="text"/>	<input type="text"/>
Currency if not AUD	<input type="text"/>

If you (and/or your partner) had more than 2 other assets, provide a separate sheet with details.

**67** Read this before answering the following questions.

The **work test** for the Pension Bonus Scheme requires the registered member or their registered partner to complete at least 960 hours of gainful work each year. That is an average of 20 hours per week for 48 weeks each year.

At least 640 of these hours must be worked in Australia.

For more information, go to **[servicesaustralia.gov.au/pensionbonusscheme](http://servicesaustralia.gov.au/pensionbonusscheme)**

Are you claiming this payment on the basis of:

Your work  ► *Go to next question*

Your partner's work  ► **Go to 69**

**68** When did you cease work?

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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 (DD MM YYYY)

or Still working

An **evidentiary certificate** is a letter issued by us which certifies that you (or your partner) have been an accruing member of the scheme for a bonus period because you (or your partner) have met the work test.

**69** Provide details about the work you have done to meet the work test


**1** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**2** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**3** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record


**4** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**5** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

 If you are providing **work records** you will need to provide a copy of the evidence such as payment summaries (group certificates), income tax returns or time sheets with the completed work record(s).

**70** Have you received a Carer Payment from us or the Department of Veterans' Affairs since your Pension Bonus Scheme registration date?

No   Go to next question

Yes   Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**69** Provide details about the work done by your partner to meet the work test


**1** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**2** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**3** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**4** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**5** Worked from (DD MM YYYY)  
    
 Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

 If you are providing **work records** you will need to provide a copy of the evidence such as payment summaries (group certificates), income tax returns or time sheets with the completed work record(s).

**70** Did your partner receive a Carer Payment from us or the Department of Veterans' Affairs since their Pension Bonus Scheme registration date?

No   Go to next question

Yes   Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**You**

**71** Have you received Community Development Employment Projects (CDEP) wages since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**72** Have you been in prison since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**73** Have you undergone psychiatric confinement because you were charged with committing an offence since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**74** Have you received periodic or lump sum compensation payments since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**75** Have you been unable to meet the work test due to a major disaster (for example, floods or fires) since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**Your deceased partner**

**71** Did your partner receive Community Development Employment Projects (CDEP) wages since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**72** Was your partner in prison since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**73** Did your partner undergo psychiatric confinement because they were charged with committing an offence since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**74** Did your partner receive periodic or lump sum compensation payments since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**75** Was your partner unable to meet the work test due to a major disaster (for example, floods or fires) since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**You**

**76** Have you taken any form of paid or unpaid leave (for example, family, recreation, sick, bereavement, long service, carer) since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**2** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**3** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**4** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

If you have taken more than 4 paid or unpaid leave periods, provide a separate sheet with details.

**Your deceased partner**

**76** Did your partner take any form of paid or unpaid leave (for example, family, recreation, sick, bereavement, long service, carer) since their Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**2** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**3** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**4** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

If your partner took more than 4 paid or unpaid leave periods, provide a separate sheet with details.

## You

- 77** In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away, sold for less than their market value or surrendered a right to any cash, assets, property or income?

**Include:**

- forgiven loans
- shares in private companies
- transfer of business or farm ownership.

No  Go to next question

Yes  Give details below

- 1** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

- 2** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

- 3** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

If you have given away or sold for less than its market value more than 3 items, provide a separate sheet with details.

## Your deceased partner

- 77** In the period from 5 years before your partner's registration date for the Pension Bonus Scheme until the date they passed away, sold for less than their market value or surrendered a right to any cash, assets, property or income?

**Include:**

- forgiven loans
- shares in private companies
- transfer of business or farm ownership.

No  Go to next question

Yes  Give details below

- 1** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

- 2** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

- 3** What you gave away or sold for less than its market value (for example, money, car, second home, land, farm)

Date given or sold (DD MM YYYY)

What it was worth

What you got for it

\$

\$

If your partner gave away or sold for less than its market value more than 3 items, provide a separate sheet with details.

78 Which of the following forms and/or documents are you providing with this form?

Where you are asked to supply documents, provide original documents. In some circumstances copies may be accepted, as detailed in the checklist below.

If you are not sure, check the question to see if you should provide the documents.

Identity documents For a list of acceptable documents, go to <a href="http://servicessaustralia.gov.au/identity">servicessaustralia.gov.au/identity</a>	<input type="checkbox"/>
Copy of proof of your partner's date of birth and date of death (at question 12)	<input type="checkbox"/>
<b>Authorising a person or organisation to enquire or act on your behalf (SS313)</b> form (if you answered Yes at question 18)	<input type="checkbox"/>
Copy of proof of your and/or your partner's Australian residence status (if you answered No at question 21)	<input type="checkbox"/>
Copy of the signed contract or agreement. (if you answered Yes at question 40)	<input type="checkbox"/>
<b>Real estate details (Mod R)</b> form (if you answered Yes at question 49, 50 or 51 and if required at question 53)	<input type="checkbox"/>
<b>Business details (Mod F)</b> form (if you answered Yes at question 51)	<input type="checkbox"/>
Copy of a document that verifies your partner was permanently blind <b>or</b> <b>Request for Ophthalmologist/Optomtrist Report (SA013)</b> form (if you answered Yes at question 54)	<input type="checkbox"/>
Copy of a letter or document which gives details for each payment from the New Zealand Government (if you answered Yes at question 54)	<input type="checkbox"/>
Latest schedules for income stream products or <b>Details of income stream product (SA330)</b> form (if you answered Yes at question 59)	<input type="checkbox"/>
Copy of a document which gives details of payment received (if you answered Yes at question 60)	<input type="checkbox"/>
Copy of a statement or certificate that gives details of payment (if you answered Yes at question 61)	<input type="checkbox"/>
<b>Business details (Mod F)</b> form and <b>Real estate details (Mod R)</b> form for each property (if you answered Yes at question 62)	<input type="checkbox"/>
<b>Private Trust (Mod PT)</b> form (if you answered No at question 64)	<input type="checkbox"/>
<b>Special Disability Trust (Mod SDT)</b> form (if you answered Yes at question 64)	<input type="checkbox"/>
<b>Private Company (Mod PC)</b> form (if you answered Yes at question 65)	<input type="checkbox"/>
Copy of proof of your and/or your partner's work records (if you answered Work record at question 69)	<input type="checkbox"/>

## Privacy notice

### 79 You need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicessaustralia.gov.au/privacy](http://servicessaustralia.gov.au/privacy)

## Declaration

### 80 I declare that:

- the information I have provided in this form is complete and correct.

#### I understand that:

- I must return **all** supporting documents at the same time as I lodge my claim form. If I do not return all documents, my claim may not be accepted. The only exception will be if I am waiting for medical evidence or other documents from a third party.
- Centrelink can make relevant enquiries to make sure I receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature

Date (DD MM YYYY)

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## Returning this form

Return this form and any supporting documents:

- online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicessaustralia.gov.au/centrelinkuploaddocs](http://servicessaustralia.gov.au/centrelinkuploaddocs)
- by post to  
Services Australia  
Seniors Services  
PO Box 7808  
CANBERRA BC ACT 2610
- in person at one of our service centres.