



When to use this form

Use this form to claim an Australian pension.

For more information

- Call Services Australia, International Services direct (free of charge) on **0800 441 248**. You can call us between 8.00 am and 5.00 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in New Zealand. If this service is not available call us on **+61 3 6222 3455**.

Note: Call charges apply – calls from mobile phones may be charged at a higher rate.

- You can write to us by:

mail at: **Services Australia
International Services
PO Box 7809
CANBERRA BC ACT 2610
Australia**

fax to: **+61 3 6222 2799**

Please include your phone number (including country and area code), so we can quickly respond to your query.

- **Information online** – If you would like further information on Centrelink services and payments, you can go to our website **servicesaustralia.gov.au**
- Alternatively, you can contact Senior Services International of the Ministry of Social Development in New Zealand, or your local office of Work and Income for advice and assistance.

Forms in your claim pack

In your claim pack, you should have the following forms:

PART 1 *Notes for claiming Australian pension*

This part tells you important information about claiming, your rights and obligations. You should read this information and keep it for future reference.

PART 2 *Claim for Australian pension*

You and your partner (if you have one) must answer ALL questions in the claim form.

Important Note: You must return your claim form and **all** supporting documents and lodge them at the same time with your claim form. If you do not return all documents, your claim may not be accepted. The only exceptions will be if you are waiting for medical evidence or statements and other forms from a third party.

Please keep these *Notes for claiming Australian pension (PART 1)*, pages 1 to 8, for your future reference.

Other forms you may need to complete

If you are claiming Disability Support Pension, you will need to complete a **Work capacity – Customer Information** form (AUS142) and have your doctor complete a **Treating doctor's report** (AUS109).

If you do not have these forms, you should contact Senior Services International of the Ministry of Social Development in New Zealand.

Your partner

Services Australia recognises both opposite-sex and same-sex relationships. This includes relationships registered under Australian state or territory laws or the laws of other countries or regions.

You must answer all questions and provide all requested information about your partner, whether same-sex or opposite-sex, even if your partner has never been to Australia or is not claiming or receiving an Australian pension.

Your partner (if you have one) can also use this claim form if they want to claim an Australian pension. Complete question 2 in PART 2 and Make sure that all questions are answered by your partner as well as yourself.

Filling in this form

Please use black or blue pen.

Mark boxes like this with a tick ✓ or ✗.

Where you see a box like this ► **Go to 5** skip to the question number shown. You do not need to answer the questions in between.

If you need more space for answers, use a separate sheet.

Returning your form(s)

Check that all required questions are answered and that all forms are signed and dated.

Important Note: You must return **all** forms and **all** supporting documents and lodge them together. If you do not return all documents, your claim may not be accepted. The only exceptions will be if you are waiting for medical evidence or statements and other forms from a third party.

You can return forms and any supporting documents:

In person/by post – to your local office of Work and Income.

Work and Income will copy original documents for you and return them to you. The claim forms do not need to be copied. If you do copy the claim forms, please ensure you keep a copy, not the original. Your local office of Work and Income will forward all forms and supporting documentation to Services Australia.

Online – submit your documents online (excluding identity documents). For more information about how to access an Online Account or how to lodge documents online, go to servicesaustralia.gov.au/submitdocumentsonline

By post – return your documents by sending them to:

**Services Australia
International Services
PO Box 7809
CANBERRA BC ACT 2610
Australia**

If you send original documents to us, we will make copies and return the original documents to you.

While you can lodge your form direct with us, lodging with the your local office of Work and Income will normally make it easier and faster for you to receive a decision on your claim.

If you need advice, call us direct (free of charge) on **0800 441 248**. You can call us between 8.00 am and 5.00 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in New Zealand. If this service is not available call us on **+61 3 6222 3455**.

Australian pension – what you can claim

Requirements

If you have never lived in Australia you cannot be paid an Australian pension.

The amount of pension you get paid will depend on how long you have lived in Australia between the ages of 20 and age pension age.

The amount of pension usually also depends on your (and/or your partner's) income and assets.

You should claim Age Pension if:

- you are over age pension age (please refer to the table below), **AND**
- you have lived in Australia for more than 10 years, OR
- the period of time you have lived in Australia and the period of time that you have lived in New Zealand between the ages of 20 and age pension age adds up to more than 10 years.

A claim lodged more than 13 weeks before you reach age pension age does not meet Australian legislation provisions and another claim will be required.

Age requirements

To be paid Age Pension you must meet the age requirements. You can lodge a claim up to 13 weeks before your qualifying age. See table below.

Date of birth	Qualifying age
On or before 31 December 1953	You meet the age requirements now
1 January 1954 to 30 June 1955	66 years
1 July 1955 to 31 December 1956	66 years 6 months
From 1 January 1957	67 years

You should claim Disability Support Pension if:

- you are aged between 16 and age pension age, AND
- you are unable to work because of a disability or are permanently blind, AND
- your disability occurred while you were living in Australia, OR
- your disability occurred while you were living in New Zealand, AND
- you have lived in Australia for more than 10 years, OR
- the period of time you have lived in Australia and the period of time that you have lived in New Zealand between the ages of 20 and date of claim adds up to more than 10 years.

Note: There are other specific requirements that must be met before you can be paid Disability Support Pension.

'Work' means any type of work which is over 8 hours per week. This is not limited to your usual occupation.

If you are claiming a Disability Support Pension you may be required to undergo a medical examination. Seniors Services International of the Ministry of Social Development in New Zealand will advise you if an examination is necessary.

You should claim Carer Payment if:

- you are providing full-time care for your partner, AND
- you have lived in Australia and/or New Zealand for a total of at least 2 years, AND
- your partner is receiving an Australian Disability Support Pension.

Information about claiming Australian pension

What you will need

As a customer you may be required to confirm your identity when claiming a payment or service from Services Australia.

If you lodge with Work and Income, they will confirm your identity for you.

If you choose to send your claim directly to us, you must confirm your identity by providing **original documents** (not copies) from the approved list below. We will return your original documents to you.

We need you to provide:

- One document to show **either** proof of birth in Australia (e.g. Australian birth certificate) **OR** proof of arrival in Australia (e.g. visa in your passport).

AND

- Other documents listed below which add up to 100 points. This list is not complete, other documents may be accepted.

Note: You cannot use the same document to make up 100 points if you use it for proof of birth in Australia or proof of arrival in Australia.

Australian documents	Points
Passport (current)	70
Citizenship Certificate	70
Birth Certificate	70
Certificate of Evidence of Resident Status	70
Australian Entry Visa	70
Driver's Licence	40
Marriage Certificate	40
Divorce Papers	40
Birth Certificate(s) of any of your child(ren)	40
Education Examination Certificates	40
Bank Card or Statements	40
Mortgage Papers	40
Certificate of Name Change	40
Rates Notices	20
Financial Papers (inc. share or superannuation statements)	10
Taxation Assessment Notice	10

Non-Australian documents	Points
Passport stamped with an entry into Australia	40
Identity Card	20
Other non-Australian documents that match the Australian documents listed above (e.g. marriage certificate, birth certificate, driver's licence etc.)	20

Note: Only a maximum of 3 non-Australian documents (excluding a current passport) can be used.

Confidential use of personal information

Personal information is treated as confidential and can only be released to someone else in special circumstances, where the law requires or where you give permission. If you have concerns about your personal information contact us. We will look into the matter and tell you about your rights to see and amend your information. If you are still not satisfied, you can contact the **Privacy Commissioner at GPO Box 5218, Sydney NSW 2001, AUSTRALIA.**

Your obligations

Australian pension is paid subject to an income and assets test.

Most forms of income will affect the amount of Australian pension that you can be paid. The income test allows you to receive an amount of income before your Australian pension will be affected. You are required to tell us about all of the income that you receive and we will work out how it affects the amount of Australian pension that you can be paid.

The assets test allows you to have a certain level of assets before your Australian pension will be affected. As with income, you are required to tell us of all of your assets and we will tell you how they affect your Australian pension.

The income test

How much payment you receive will depend on your circumstances and your (and/or your partner's) income and assets.

We calculate the amount that could be paid to you, and if applicable, to your partner under both the income test and the assets test. The test giving the lower rate of payment is the one used to pay you and/or your partner.

Income includes money received from employment and money deemed to be earned from investments. It also includes money from outside Australia.

You can have income up to certain amounts before your payment is reduced.

Your income may include:

- deemed income from financial assets
- gross employment income (i.e. income before tax)
- income received to provide care
- net income from business, including farms
- 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, superannuation pensions and annuities.

For more information about income visit servicesaustralia.gov.au/income

The assets test

Most things you own 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.

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

Your 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 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
- licenses, for example fishing or taxi
- surrender value of life insurance policies, and
- any assets given away or sold for less than their market value within the last five 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, and
- assets up to a certain limit held in a Special Disability Trust (SDT) for an immediate family member.

These are called exempt assets.

For more information about assets visit servicessaustralia.gov.au/assets

Changes you must tell us about

As soon as you have lodged your claim for Australian pension, you must tell us **within 28 days** if any of these things happen or may happen. You can tell us by writing to us, by telephoning us on **+61 3 6222 3455** or direct (free of charge) on **0800 441 248** or by facsimile on **+61 3 6222 2799**.

- Income**
- if you and/or your partner start to receive a pension from a country, other than Australia and New Zealand, or you are already getting one and it increases (e.g. annual reviews)
 - if you and/or your partner claim or receive compensation for work related accidents or illnesses
 - if you and/or your partner start work or recommence work, or start any form of profession, trade, business or self employment
 - if you and/or your partner receive a private pension or superannuation pension, or the private pension or superannuation pension you are already getting increases
 - if you and/or your partner start to receive rent, or the rent you are getting increases
 - if you and/or your partner's combined income from any source other than investments increases
 - if you and/or your partner buy or sell any shares or managed investments
 - if you and/or your partner receive any bonus shares.
-

- Assets**
- if you and/or your partner's combined assets other than financial investments increase
 - if you and/or your partner's combined financial investments increase by more than \$A 1,000
 - if you and/or your partner open any new accounts
 - if you and/or your partner give away assets or sell them for less than their value.
-

- Other things you must tell us**
- if you get married or commence living with a person in a registered or de facto relationship
 - if you stop living with your partner
 - if you divorce
 - if your partner dies
 - if you and/or your partner move into or out of a nursing home, hostel or retirement village
 - if you and/or your partner or any of your dependent children/students are charged with an offence and are in custody or remanded in a psychiatric institution or in jail
 - if you and/or your partner sell, rent out or dispose of the home you live in
 - if you and/or your partner leave your home for more than 12 months
 - if you change your address you should tell us straight away. If mail is returned to us because you are not at the last address you gave us, your payments may be delayed or stopped
 - if you are paid by direct deposit, you must advise us before you close or change your bank account
 - if you and/or your partner return to Australia, as your rate will probably change from the date you arrive
 - you must also tell us if you and/or your partner leave the country you live in, either permanently or temporarily, as your Australian pension may no longer be payable.

Please keep these *Notes for claiming Australian pension (PART 1)*, pages 1 to 8, for your future reference.

centrelink

OFFICE USE ONLY – Date of receipt at Work and Income in New Zealand

Date stamp

2

You

1 If we need to contact you what is your preferred language?

1

2

2 Do you have a partner?

If your partner is now deceased, please fill in 'Your partner' details at questions 6, 7, 8, 9, 14 and 21 ONLY.

No **Go to 5**

Yes *Go to next question*

3 Is your partner also claiming an Australian pension?

No You must still answer all the questions about them.

Yes *Go to next question*

4 Is your partner using this form or a separate form for a claim or to provide their details?

This form

Separate form

5 What type of payment do you wish to claim?

Age Pension

Disability Support Pension

Carer Payment

Your partner

If your partner is now deceased, please fill in 'Your partner' details at questions 6, 7, 8, 9, 14 and 21 ONLY.

5 What type of payment do you wish to claim?

Age Pension

Disability Support Pension

Carer Payment

Not claiming at this time



CLK0AUS140NZ 2310

You

6 Your name

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

7 Have you ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?

No Go to next question

Yes Give details below

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. maiden name)

If you have more than 2 other names, attach a separate sheet with details.

8 Your gender

Male

Female

Other

9 Your date of birth

Day	Month	Year
/	/	



Attach an original document as proof of your date of birth.

Your partner

6 Your name

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

7 Have you ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?

No Go to next question

Yes Give details below

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. maiden name)

If you have more than 2 other names, attach a separate sheet with details.

8 Your gender

Male

Female

Other

9 Your date of birth

Day	Month	Year
/	/	



If you are claiming Age Pension, attach an original document as proof of your date of birth.

You

10 Your permanent address

Country

11 Your postal address (if different to above)

Country

12 Your contact details

It is important that you include the complete number (including country and area codes) as we may need to contact you on these numbers.

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the Terms and Conditions, go to our website servicesaustralia.gov.au/em

Home phone number

Country () Area code ()

Mobile phone number

--

Work phone number

Country () Area code ()

Fax number

Country () Area code ()

Alternative phone number

Country () Area code ()

Email

@

Your partner

10 Your permanent address

Country

11 Your postal address (if different to above)

Country

12 Your contact details

It is important that you include the complete number (including country and area codes) as we may need to contact you on these numbers.

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the Terms and Conditions, go to our website servicesaustralia.gov.au/em

Home phone number

Country () Area code ()

Mobile phone number

--

Work phone number

Country () Area code ()

Fax number

Country () Area code ()

Alternative phone number

Country () Area code ()

Email

@

You

13 Are you currently receiving an Australian pension?

No Go to next question

Yes Give details below

What payment are you receiving?

Your Centrelink Reference Number (if known)

 - - -

Name payments are made in

▶ **Go to 15**

14 Have you claimed or received an Australian pension or benefit in the last 10 years?

No Go to next question

Yes Give details below

What payment did you last claim or receive?

Your Centrelink Reference Number (if known)

 - - -

Name claim was made in

Your partner

13 Are you currently receiving an Australian pension?

No Go to next question

Yes Give details below

What payment are you receiving?

Your Centrelink Reference Number (if known)

 - - -

Name payments are made in

▶ **Go to 15**

14 Have you claimed or received an Australian pension or benefit in the last 10 years?

No Go to next question

Yes Give details below

What payment did you last claim or receive?

Your Centrelink Reference Number (if known)

 - - -

Name claim was made in

15 Please read this before answering the question.

Select **ONE** option below that best describes your current relationship status.

What is your **CURRENT** relationship status?

Married **Go to 16**

Registered relationship **Go to 16**
(relationship registered under Australian state or territory laws)

Partnered **Go to 17**
(living together in a relationship, including de facto)

Separated **Go to 22**
(previously lived with a partner, including in a marriage, registered or de facto relationship)

Divorced **Go to 22**

Widowed **Go to 21**
(previously partnered, including in a marriage, registered or de facto relationship)

Never married or lived with a partner **Go to 26**

16 What is your date of marriage or relationship registration?

If you have **ever been separated**, list the date that you most recently reconciled with your partner.

Day / Month / Year

Country where you married or your relationship was registered

Go to 18

17 When did you and your partner start living together?

If you have **ever been separated**, list the date that you most recently reconciled with your partner.

Day / Month / Year

18 Do you currently live in the same home as your partner?

No **Go to next question**

Yes **Go to 24**

19 Why are you not living with your partner?

Partner's illness

Your illness

Partner in prison

Partner's employment

Other Give details below

20 Period not living with your partner

From Day / Month / Year

To Day / Month / Year

OR Indefinite **Go to 24**

21 Please give the following details about your deceased partner.

Date of death

Day / Month / Year

Country where partner died

Go to 26

22 Do you live in the same home as your former partner?

No

Yes

23 Please give the following details about your former partner.

Full name

Date of birth

Day / Month / Year

Date relationship ended

Day / Month / Year

Current address (if known)

Country

Go to 26

24 Do you give your partner permission to make enquiries on your behalf with Services Australia?

No

Yes

25 Does your partner give permission for you to make enquiries on their behalf with Services Australia?

No

Yes

26 Do you live with anyone else, other than members of your family?

No

Yes a


27 Do you (and/or your partner) have any dependent children or students?

A dependent child is a young person under age 16 or a full-time student under age 22 who is in your care and has limited income. A young person cannot be dependent if they are not studying full-time or are earning income.

No **▶** Go to next question

Yes **▶** Give details below

AND

 If any child is in full-time study, you should provide a statement from the educational institution confirming their enrolment.

1 Child's name

Date of birth

Day	Month	Year
/	/	

Is the child in full-time study?

No Yes

Does the child live with you?

No Yes

Has the child lived in Australia or been an Australian resident?

No Yes

2 Child's name

Date of birth

Day	Month	Year
/	/	

Is the child in full-time study?

No Yes

Does the child live with you?

No Yes

Has the child lived in Australia or been an Australian resident?

No Yes

3 Child's name

Date of birth

Day	Month	Year
/	/	

Is the child in full-time study?

No Yes

Does the child live with you?

No Yes

Has the child lived in Australia or been an Australian resident?

No Yes

4 Child's name

Date of birth

Day	Month	Year
/	/	

Is the child in full-time study?

No Yes

Does the child live with you?

No Yes

Has the child lived in Australia or been an Australian resident?

No Yes

If you have more than 4 children, attach a separate sheet with details.

Accommodation

28 Which of the following best describes where you live?

In a home you (and/or your partner) own.

This includes paying it off (mortgage). **Go to 29**

In a place where you pay private rent or board and lodging

Go to 43

In a retirement village

Go to 33

In accommodation which you have the right to use for life (such as a granny flat)

Go to 35

In a residential aged care home (nursing home or hostel) which provides nursing care

Go to 36

Other

Give details below

Go to 43

Your principal home


29 Is your principal home, or the land on which your principal home stands, used for commercial (business) purposes?

No **Go to 31**

Yes **Go to next question**

30 Have you previously told Centrelink about your principal home, or the land on which it stands, which is used for commercial (business) purposes?

No

 Attach a copy of the latest balance sheet, profit and loss statements, tax returns and your (and/or your partner's) latest personal tax return.

Go to next question

Yes **Go to next question**

31 Is the land on which your principal home stands more than two hectares (five acres) in area?

No **Go to next question**

Yes

 You will need to complete and attach a **Real estate details** form (**Mod R**). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

32 Is the land on which your principal home stands on more than one title?

No **Go to 43**

Yes

 You will need to complete and attach a **Real estate details** form (**Mod R**). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

Go to 43

Retirement village

33 Did you pay an entry contribution for your accommodation in the retirement village?

No **Go to next question**

Yes How much?

Currency

34 Do you still own your former home?

No **Go to 43**

Yes

Make sure you provide details of your former home at question 82 on page 26.

35 Did you pay a sum of money or transfer any assets to another person in return for this accommodation for life?

No **Go to 43**

Yes Give details below

Name of person or organisation

Address

Country

Date paid/transferred

Day	Month	Year
/	/	

Amount paid

Currency

OR

What asset was transferred

Market value of assets transferred

Currency

Go to 43

Residential aged care home (nursing home or hostel) which provides nursing care

36 On what date did you move into your accommodation in the nursing home or hostel?

Day	Month	Year
/	/	

37 Do you still own your former home?

No **Go to 43**

Yes *Go to next question*

38 Do you have a partner?

No **Go to 42**

Yes *Go to next question*

39 Does your partner still live in your former home?

No *Go to next question*

Yes **Go to 43**

40 What date did your partner leave your former home?

Day	Month	Year
/	/	

41 Did your partner leave your former home more than two years ago?

No **Go to 43**

Yes *Make sure you provide details of your former home at question 82 on page 26.*

Go to 43

42 Did you leave your former home more than two years ago?

No *Go to next question*

Yes *Make sure you provide details of your former home at question 82 on page 26.*

Please read this before answering the following questions.



To claim an Australian pension, a period of permanent Australian residence must be proved.
 'Permanent' means you lived in Australia on a long-term basis, with a permanent residence visa or as an Australian citizen. Holidays in Australia are not included. Holidays or short trips outside Australia while you were living in Australia are included as part of your residence in Australia.
 A list of suitable documents is shown in PART 1 for proof of identity and proof of residence in Australia. If you have no documents to confirm your residence in Australia a benefit may not be granted.
 Attach to your claim certified copies of any documents which verify your residence in Australia.

You

43 What is your country of birth?

44 What are your countries of citizenship or nationality?

Australia Date of grant

Day	Month	Year
/	/	

Other Please list all other countries where you have citizenship or nationality.

45 Give details of all countries (including Australia) where you have lived since birth.

'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

1 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

2 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

3 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

If you have lived in more than 3 countries, attach a separate sheet with details.

Your partner

43 What is your country of birth?

44 What are your countries of citizenship or nationality?

Australia Date of grant

Day	Month	Year
/	/	

Other Please list all other countries where you have citizenship or nationality.

45 Give details of all countries (including Australia) where you have lived since birth.

'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

1 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

2 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

3 Country

From

Day	Month	Year
/	/	

To

Day	Month	Year
/	/	

Time worked in the country

Years	Months
/	

If you have lived in more than 3 countries, attach a separate sheet with details.

You

- 46** For each of the arrivals in, and departures from Australia identified at question 45, please provide the following details.

Be as accurate as possible, even if you can only remember the year you first arrived in Australia.

1 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

2 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

3 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

If you require more space, attach a separate sheet with details.

Your partner

- 46** For each of the arrivals in, and departures from Australia identified at question 45, please provide the following details.

Be as accurate as possible, even if you can only remember the year you first arrived in Australia.

1 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

2 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

3 Arrival date	Name of ship or airline
Day / Month / Year	
Place of arrival	
Visa details on arrival	
Visa sub-class	Date visa granted
	Day / Month / Year
Departure date	Name of ship or airline
Day / Month / Year	
Place of departure	

If you require more space, attach a separate sheet with details.

You

47

If Centrelink is unable to verify your Australian residence Centrelink will need to contact people who knew you in Australia.

Give the names, addresses and telephone numbers of 3 people, not related to you, who are currently living in Australia and can confirm your residence in Australia.

1 Full name

Address

Postcode

Contact phone number

Area code ()

2 Full name

Address

Postcode

Contact phone number

Area code ()

3 Full name

Address

Postcode

Contact phone number

Area code ()

Your partner

47

If Centrelink is unable to verify your Australian residence Centrelink will need to contact people who knew you in Australia.

Give the names, addresses and telephone numbers of 3 people, not related to you, who are currently living in Australia and can confirm your residence in Australia.

1 Full name

Address

Postcode

Contact phone number

Area code ()

2 Full name

Address

Postcode

Contact phone number

Area code ()

3 Full name

Address

Postcode

Contact phone number

Area code ()

INCOME AND ASSETS

48 Please read this before answering the following questions.


These income and assets questions relate to your (and/or your partner's) income and assets in ALL countries – not just New Zealand or Australia.

49 Are you (and/or your partner) currently paid or expecting to be paid any income from work other than self-employment?

Do NOT include self-employment here. Please advise if you are self-employed at question 87.

- No **Go to 51**
 Yes Give details below

AND

 Attach a copy of your most recent payslip(s). If the amount of income you stated is not your usual wage, please attach payslips for the past 13 weeks.

1 Name of employer

Address of employer

Country

Job description

Workplace (if different from your employer's address)

Who works for this employer? You Your partner

Type of work

Full-time

Part-time How many hours do you work?

 per week

Amount paid **before** tax and other deductions

 per week

Amount paid annually **including all bonuses and additional payments, before tax and other deductions**

Currency

Do you plan to stop working soon?

No

Yes Date you plan to stop working

Day	Month	Year
/	/	

49 *Continued*

2 Name of employer

Address of employer

Country

Job description

Workplace (if different from your employer's address)

Who works for this employer? You Your partner

Type of work

Full-time

Part-time How many hours do you work?

 per week

Amount paid **before** tax and other deductions

 per week

Amount paid annually **including all bonuses and additional payments, before tax and other deductions**

Currency

Do you plan to stop working soon?

No

Yes Date you plan to stop working

Day	Month	Year
/	/	

If you (and/or partner) work for more than 2 employers, attach a separate sheet with details.

50 Do you (and/or your partner) receive a fringe benefit provided by this employer?

Fringe benefit means a benefit you receive as part of your employment income but not as a wage or salary (e.g. use of a car as part of a salary package).

No **Go to next question**

Yes  Attach documents which indicate the type of fringe benefit and its value.

51 Please read this before answering the following questions.

If you are claiming an Age Pension, you do NOT need to answer questions 52 to 54. **Go to 55**


If you are claiming another payment. *Go to next question*

52 In the last 12 months, have you (and/or your partner) stopped working for any employers (including self-employment)?

No **Go to 55**

Yes Give details below

AND

 Please attach details which confirm you have stopped working for an employer (e.g. letter from employer)

1 Name of employer

Address of employer

Country

Who stopped this work? You Your partner

Date last worked Date last paid
Day / Month / Year Day / Month / Year

2 Name of employer

Address of employer

Country


Who stopped this work? You Your partner

Date last worked Date last paid
Day / Month / Year Day / Month / Year

If you (and/or partner) stopped work with more than 2 employers, attach a separate sheet with details.

53 Have you (and/or your partner) received any redundancy payments since 20 September 2006?

No *Go to next question*

Yes  Please attach details which confirm the redundancy payment (e.g. letter from employer).

54 Have you (and/or your partner) received any leave entitlement payments?

No *Go to next question*

Yes  Please attach details which confirm the leave entitlement payments (e.g. letter from employer).

55 Please read this before answering the following question about the market value of household contents and personal effects.

Market value is what you would get if you sold your household contents and personal effects. It is not the replacement or insured value.

Household contents include:

- all normal furniture such as soft furnishings (e.g. curtains)
- electrical appliances (other than fixtures such as stoves and built-in items)
- antiques and works of art.

Personal effects include:

- jewellery for personal use
- hobby collections (e.g. stamps, coins).

What is your estimate of the net market value of your (and/or your partner's) normal household contents and personal effects?

Amount	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %


56 Do you (and/or your partner) have any life insurance policies that can be cashed in?

Do NOT include details of life office or friendly society insurance bonds in this question. You will be asked about this in a later question.

No Go to next question

Yes Give details below

AND

 Attach the policy document and the latest statement for each policy listed below.

1 Name of insurance company

Policy number

Surrender value Currency

Owned by: You Your partner

2 Name of insurance company

Policy number

Surrender value Currency

Owned by: You Your partner

3 Name of insurance company

Policy number

Surrender value Currency

Owned by: You Your partner

4 Name of insurance company

Policy number

Surrender value Currency

Owned by: You Your partner

If you (and/or your partner) require more space, attach a separate sheet with details.

57 Do you (and/or your partner) receive payments from an income protection policy?

No Go to next question

Yes  Attach the policy document and the latest statement for this policy.

58 Do you (and/or your partner) have any funeral bonds/funeral investments, including a pre-paid funeral?

No Go to next question

Yes Give details below

1 Name of company

Name of product

APIR code Purchase price incl. instalments but not interest
 \$

Current value as per latest statement Your share % Partner's share %

2 Name of company

Name of product

APIR code Purchase price incl. instalments but not interest
 \$

Current value as per latest statement Your share % Partner's share %

If you (and/or your partner) require more space, attach a separate sheet with details.

59 Have you (and/or your partner) a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No Go to next question

Yes  Attach a copy of each contract.

60 Do you (and/or your partner) own any motor vehicles, boats, caravans or trailers?

Do NOT include a vehicle, boat, caravan or trailer that is your primary residence.

No Go to next question

Yes Give details below

1 Make	Model
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Amount owing	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

2 Make	Model
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Amount owing	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

3 Make	Model
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Amount owing	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

4 Make	Model
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Amount owing	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) require more space, attach a separate sheet with details.

61 Give details of all your (and/or your partner's) bank accounts, including term deposits, joint accounts and accounts you (and/or your partner) hold under any other name.

 Attach statements for each account.

1	Name of institution <input type="text"/>
	Type of account (e.g. savings) <input type="text"/>
	Account number <input type="text"/>
	Account balance <input type="text"/>
	Currency <input type="text"/>
	Name of account holder(s) <input type="text"/>
	<input type="text"/>

2	Name of institution <input type="text"/>
	Type of account (e.g. savings) <input type="text"/>
	Account number <input type="text"/>
	Account balance <input type="text"/>
	Currency <input type="text"/>
	Name of account holder(s) <input type="text"/>
	<input type="text"/>

3	Name of institution <input type="text"/>
	Type of account (e.g. savings) <input type="text"/>
	Account number <input type="text"/>
	Account balance <input type="text"/>
	Currency <input type="text"/>
	Name of account holder(s) <input type="text"/>
	<input type="text"/>

If you (and/or your partner) require more space, attach a separate sheet with details.

62 Do you (and/or your partner) have any bonds or debentures?


Include investments inside and outside Australia.

Do NOT include friendly society bonds or life insurance bonds. You will be asked about these in a later question.

No Go to next question

Yes Give details below

AND

 Attach the latest statement for each investment listed below.

1 Type of investment

Name of company

Current amount invested

Currency

Your share %

Partner's share %

2 Type of investment

Name of company

Current amount invested

Currency

Your share %

Partner's share %

3 Type of investment

Name of company

Current amount invested

Currency

Your share %

Partner's share %

If you (and/or your partner) require more space, attach a separate sheet with details.

63 Do you (and/or your partner) have money on loan to another person or organisation?

Include all loans, whether they are made to family members, other people or organisations or trusts.

No Go to next question

Yes Give details below

AND

 Attach a document which gives details for each loan (if available).

1 Who did you lend the money to?

Date lent

Amount lent

Day / Month / Year

Current balance of loan

Currency

Lent by you %

Lent by your partner %

2 Who did you lend the money to?

Date lent

Amount lent

Day / Month / Year

Current balance of loan

Currency

Lent by you %

Lent by your partner %

3 Who did you lend the money to?

Date lent

Amount lent

Day / Month / Year

Current balance of loan

Currency

Lent by you %

Lent by your partner %

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

64 Do you (and/or your partner) own any shares, options, rights, convertible notes, warrants or other securities LISTED on any stock exchange, inside or outside Australia?


Include shares traded in exempt stock markets.

* ASX means Australian Stock Exchange.

No Go to next question

Yes Give details below

AND

 Attach the latest statement(s) detailing your share holding for each share listed below.

1 Name of company

Type of share/investment (e.g. ordinary share, option)

ASX* code (if known) Current market value (if share is NOT listed on the ASX*)

Country (if share is NOT listed on the ASX*) Number of shares or other securities

Your share % Partner's share %

2 Name of company

Type of share/investment (e.g. ordinary share, option)

ASX* code (if known) Current market value (if share is NOT listed on the ASX*)

Country (if share is NOT listed on the ASX*) Number of shares or other securities

Your share % Partner's share %

If you (and/or your partner) require more space, attach a separate sheet with details.


65 Do you (and/or your partner) own any shares, options or rights issued in a PUBLIC company NOT listed on any stock exchange, inside or outside Australia?

Include shares traded in exempt stock markets.

No Go to next question

Yes Give details below

AND

 Attach the latest statement(s) detailing your share holding for each share listed below.

1 Name of company

Type of shares Number of shares

Current market value Currency

Your share % Partner's share %

2 Name of company

Type of shares Number of shares

Current market value Currency

Your share % Partner's share %

3 Name of company

Type of shares Number of shares

Current market value Currency

Your share % Partner's share %

If you (and/or your partner) require more space, attach a separate sheet with details.

66 Do you (and/or your partner) have any managed investments?

Include investment trusts, personal investment plans, life office and friendly society bonds.


Do NOT include life insurance policies or superannuation and rollover investments.

* APIR is a commonly used code for fund managers in Australia to identify individual financial products.

No Go to next question

Yes Give details below

AND

 Attach documents which show details for each investment listed below.

1 Name of company

Name of product (e.g. investment trust)

Type of product/option (e.g. balanced, growth)

APIR* code (if known)

Number (if applicable)

Current market value of investment

Currency

Your share

%

Partner's share

%

2 Name of company

Name of product (e.g. investment trust)

Type of product/option (e.g. balanced, growth)

APIR* code (if known)

Number (if applicable)

Current market value of investment

Currency

Your share

%

Partner's share

%


If you (and/or your partner) require more space, attach a separate sheet with details.

67 Do you (and/or your partner) own any managed investments or securities purchased with a margin loan?

No Go to next question

Yes Give details below

AND

 Attach the latest statement detailing your margin loan(s) for each investment.

1 Name of margin loan company

Current portfolio

APIR code (if known)

Current margin loan balance

Your share

Partner's share

%

%

2 Name of margin loan company

Current portfolio

APIR code (if known)

Current margin loan balance

Your share

Partner's share

%

%

If you (and/or your partner) require more space, attach a separate sheet with details.

68 Please read this before answering the following question.

YOU should answer this question **ONLY** if you (and/or your partner) are age pension age or claiming Age Pension.

Age requirements

See table on page 3 for age pension age.

Do you (or your partner) have any money invested in Australian superannuation where the fund is still in accumulation phase and not paying a pension?


Include:

- superannuation funds such as retail, industry, corporate or employer and public sector
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

No Go to next question

Yes Give details below

AND

 Attach the latest statement for each superannuation investment. If you have a SMSF or SAF, attach the financial returns and member statement for the fund.

1 Name of institution/fund manager

Name of fund

Product reference number

Date of joining/investment

Day	Month	Year
/	/	

Current market value

\$

Owned by

You Your partner

2 Name of institution/fund manager

Name of fund

Product reference number

Date of joining/investment

Day	Month	Year
/	/	

Current market value

\$

Owned by

You Your partner

If you (and/or your partner) require more space, attach a separate sheet with details.

69 Please read this before answering the following question.

An **income stream** is a regular series of payments which may be made for a lifetime or fixed period by a financial institution or employer subject to Australian prudential regulations.

Where the income stream is from a country other than Australia it will be assessed differently than if it were from a source inside Australia.

An income stream may be payable 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 (e.g. ComSuper pension, State Super pension)
- superannuation pension (non-defined benefit).

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

No Go to next question

Yes Give details below

AND

 You (and/or your partner) will need to attach a **Details of Income Stream Product** form (SA330) or a similar schedule, for each Australian income stream product. The form or similar schedule must be completed by your 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 our website servicesaustralia.gov.au/forms or call Services Australia.

1 Name of product provider/SMSF/SAF

Type of income stream

Product reference number

Commencement date

Day	Month	Year
/	/	

Owned by: You Your partner

2 Name of product provider/SMSF/SAF

Type of income stream

Product reference number

Commencement date

Day	Month	Year
/	/	

Owned by: You Your partner

If you (and/or your partner) have more than 2 income stream products, attach a separate sheet with details.

70 Do you (and/or your partner) have any money invested in, or do you receive income from, any other investments not declared elsewhere on this form?

Include all investments inside and outside Australia not declared elsewhere on this form.

Do NOT include real estate inside or outside Australia, private trusts, private companies or business. You will be asked about these in later questions.

No Go to next question

Yes Give details below

AND

 Attach documents which show details for each investment listed below.

1 Name of investment

Name of organisation/company

Current value of investment	Income received in last 12 months
<input type="text"/>	<input type="text"/>

Currency	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

2 Name of investment

Name of organisation/company

Current value of investment	Income received in last 12 months
<input type="text"/>	<input type="text"/>

Currency	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you (and/or your partner) require more space, attach a separate sheet with details.

71 Do you (and/or your partner) currently get any kind of pension or annuity?


Include Employer Superannuation Pensions, Immediate Annuities and Allocated Pensions or Annuities from Australia, New Zealand or any other country.

Do NOT include New Zealand Superannuation paid by Work and Income.

No Go to next question

Yes Give details below

AND

 Attach a copy of your latest statement(s) from your provider(s) or similar documents.

1 Name of provider

Country paid from	Type of pension/annuity
<input type="text"/>	<input type="text"/>

Amount received per annum	Currency
<input type="text"/>	<input type="text"/>

Paid to: You Your partner

2 Name of provider

Country paid from	Type of pension/annuity
<input type="text"/>	<input type="text"/>

Amount received per annum	Currency
<input type="text"/>	<input type="text"/>

Paid to: You Your partner

3 Name of provider

Country paid from	Type of pension/annuity
<input type="text"/>	<input type="text"/>

Amount received per annum	Currency
<input type="text"/>	<input type="text"/>

Paid to: You Your partner

If you (and/or your partner) require more space, attach a separate sheet with details.

72 In the last five years have you (and/or your partner) given away, sold for less than their value, or surrendered a right to, any cash, assets, property or income?

Include waived/forgiven loans and shares in private companies.

No Go to next question

Yes Give details below

1 What you gave away or sold for less than its value (e.g. money, car, second home, land, farm)

Date given or sold

What it was worth

Day / Month / Year

What you got for it

Currency

Your share %

Partner's share %

Was this gift to a Special Disability Trust (SDT)?

No Yes

2 What you gave away or sold for less than its value (e.g. money, car, second home, land, farm)

Date given or sold

What it was worth

Day / Month / Year

What you got for it

Currency

Your share %

Partner's share %

Was this gift to a Special Disability Trust (SDT)?

No Yes

If you (and/or your partner) require more space, attach a separate sheet with details.

73 Do you (and/or your partner) receive income from outside Australia?

Includes:

- payments for retirement or old age
- payments for disability or invalidity
- payments for widowhood or survivorship
- payments for children
- superannuation payments
- payments for war injury
- payments for war service
- payments as a war widow
- war restitution payments
- compensation payments
- other pensions, benefits or allowances from outside Australia.

No Go to next question

Yes Give details below

AND



Attach documents which show the payment details (e.g. pension certificate).

1 Type of payment

Paid in name of

Authority paying it

Country paying it

Reference number

Amount of payment before deductions

Currency of payment

How often paid?

Received by:

You Your partner

73 *Continued*

2 Type of payment

Paid in name of

Authority paying it

Country paying it Reference number

Amount of payment before deductions Currency of payment

How often paid? Received by:

 You Your partner

3 Type of payment

Paid in name of

Authority paying it

Country paying it Reference number

Amount of payment before deductions Currency of payment

How often paid? Received by:

 You Your partner

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

74 Will you (and/or your partner) be claiming any pension, benefit, allowance, superannuation, compensation or similiar payment in the next 12 months?

No ➤ *Go to next question*

Yes ➤ *Give details below*

1 Type of payment

Country claiming from

When are you going to claim? Who is claiming this payment?

Day Month Year You Your partner

/ / /

2 Type of payment

Country claiming from

When are you going to claim? Who is claiming this payment?

Day Month Year You Your partner

/ / /

If you (and/or your partner) have more than 2 types of payments, attach a separate sheet with details.

75 Do you (and/or your partner) receive money from any boarders or lodgers living with you?

Include boarders or lodgers who live with you or in accommodation at the property you live in (e.g. granny flat).
Do NOT include family members (e.g. son, daughter, parent).

No Go to next question

Yes Give details below

1 Name of boarder or lodger	
<input type="text"/>	
Relationship to you (e.g. friend, cousin)	Number of meals you provide each day
<input type="text"/>	<input type="text"/> each day
Amount paid for board or lodging	Currency
<input type="text"/>	<input type="text"/>
How often paid	Date boarder or lodger started paying
<input type="text"/>	Day / Month / Year <input type="text"/> / <input type="text"/> / <input type="text"/>

2 Name of boarder or lodger	
<input type="text"/>	
Relationship to you (e.g. friend, cousin)	Number of meals you provide each day
<input type="text"/>	<input type="text"/> each day
Amount paid for board or lodging	Currency
<input type="text"/>	<input type="text"/>
How often paid	Date boarder or lodger started paying
<input type="text"/>	Day / Month / Year <input type="text"/> / <input type="text"/> / <input type="text"/>

3 Name of boarder or lodger	
<input type="text"/>	
Relationship to you (e.g. friend, cousin)	Number of meals you provide each day
<input type="text"/>	<input type="text"/> each day
Amount paid for board or lodging	Currency
<input type="text"/>	<input type="text"/>
How often paid	Date boarder or lodger started paying
<input type="text"/>	Day / Month / Year <input type="text"/> / <input type="text"/> / <input type="text"/>

If you (and/or your partner) have more than 3 boarders or lodgers, attach a separate sheet with details.


76 Do you (and/or your partner) receive payments from sources other than Centrelink income support payments?

For example, a payment from the Department of Veterans' Affairs (DVA).

No Go to next question

Yes Give details below

AND

 Attach a letter or other document(s) that shows the reference number and details for each payment (other than payments made by us).

1 Type of payment	
<input type="text"/>	
Who pays it?	
<input type="text"/>	
Reference number (if known)	Date commenced (if known)
<input type="text"/>	Day / Month / Year <input type="text"/> / <input type="text"/> / <input type="text"/>
Paid to: You <input type="checkbox"/> Your partner <input type="checkbox"/>	

2 Type of payment	
<input type="text"/>	
Who pays it?	
<input type="text"/>	
Reference number (if known)	Date commenced (if known)
<input type="text"/>	Day / Month / Year <input type="text"/> / <input type="text"/> / <input type="text"/>
Paid to: You <input type="checkbox"/> Your partner <input type="checkbox"/>	

If you (and/or your partner) receive more than 2 payments, attach a separate sheet with details.

77 In the last 12 months, have you (and/or your partner) received a lump sum payment that is not declared elsewhere on this form?

Do NOT include compensation, insurance or damages lump sum payments. You will be asked about this in a later question.

No Go to next question

Yes Give details below

1 Type of lump sum

Amount paid Currency

Date paid Payment received by:

Day / Month / Year You Your partner

2 Type of lump sum

Amount paid Currency

Date paid Payment received by:

Day / Month / Year You Your partner

If you (and/or your partner) have more than 2 lump sum payments, attach a separate sheet with details.

78 Do you (and/or your partner) receive any income from other sources?

Include income from:

- gratuities
- other government departments (e.g. study allowance, War Widow's/Service Pension)
- match or sporting payments
- other payments made from inside or outside Australia
- any other income you have not included elsewhere on this form.


Note: Income includes any payment in kind, such as non-monetary payments for services.

Do NOT include compensation or damages payments. You will be asked about these in a later question.

No Go to next question

Yes Give details in the next column

AND

 Attach documents which show details of the payment (e.g. statement from other Government departments).

78 *Continued*

1 Type of payment

Who pays it

Amount received before tax and other deductions Currency

How often paid If part of amount is for children – how much

Paid to: You Your partner

2 Type of payment

Who pays it

Amount received before tax and other deductions Currency

How often paid If part of amount is for children – how much

Paid to: You Your partner

3 Type of payment

Who pays it

Amount received before tax and other deductions Currency

How often paid If part of amount is for children – how much

Paid to: You Your partner

If you (and/or your partner) have more than 3 other payments, attach a separate sheet with details.

79 Do you (and/or your partner) have any cash holdings?

Include notes and coins you have in a safety deposit box, or you are holding instead of putting it into a bank account, or someone else is looking after for you.

Do NOT include cash you have for shopping and other day to day expenses.

No **Go to next question**

Yes **Give details below**

Amount	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

80 Do you (and/or your partner) own or partly own any property or real estate, apart from the home in which you live?

Include properties in Australia, New Zealand or any other countries.

No **Go to 82**

Yes **How many properties do you have?**

81 Give the following details for each property you (and/or your partner) own or partly own, apart from the home in which you live.

1 Address

.....

Postcode

Type (e.g. vacant land, house, farm, units/flats) Is this your former home as indicated at question 34, 41 or 42? No Yes

Current market value Currency

Your share % Partner's share %

Is the property mortgaged?
 No
 Yes Amount owing Currency

Is income received from this property?
 No
 Yes Gross amount received Currency

2 Address

.....

Postcode

Type (e.g. vacant land, house, farm, units/flats) Is this your former home as indicated at question 34, 41 or 42? No Yes

Current market value Currency

Your share % Partner's share %

Is the property mortgaged?
 No
 Yes Amount owing Currency

Is income received from this property?
 No
 Yes Gross amount received Currency

If you (and/or your partner) own more than 2 properties, attach a separate sheet with details.

82 In the last 12 months have you (and/or your partner) borrowed an amount which is secured against your home?

Include:

- Home Equity Conversion Loan
- Reverse Equity Mortgage.


Do NOT include:

- a mortgage taken out to purchase your home.

No Go to next question

Yes Give details below

AND

 Attach a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

Address of the organisation

Country

Entered into by: You Your partner

If you (and/or your partner) require more space, attach a separate sheet with details.

83 Please read this before answering the following question about compensation, insurance and/or damages.

Includes:

- workers' compensation/damages as a result of a work injury
- third party damages as a result of a motor vehicle accident
- personal accident and sickness insurance or income replacement insurance
- sporting injury compensation
- public liability compensation
- medical negligence compensation
- damages paid to victims of crime or as a result of criminal injuries.

Have you (or your partner) ever **CLAIMED** or are you (or your partner) **ABLE TO CLAIM** compensation, insurance and/or damages?

No Go to next question

Yes  You will need to complete and attach a **Compensation and damages** form (Mod C). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

84 Are you (and/or your partner) **RECEIVING** or have you (and/or your partner) **EVER BEEN PAID** compensation, insurance and/or damages?

No Go to next question

Yes  You will need to complete and attach a **Compensation and damages** form (Mod C). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

85 Are you (and/or your partner), or have you (and/or your partner) been, involved in a private trust?

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


- a trustee
- an appointor
- a beneficiary

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 five years
- relinquished control of a private trust since 1 January 2002
- a private annuity
- a life interest
- an interest in a deceased estate.

Note: This includes family trusts.

No Go to next question

Yes  You will need to complete and attach a **Private Trust** form (Mod PT). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

86 Are you (and/or your partner), or have you (and/or your partner) been, involved in a private company?


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

- a director
- a shareholder

or have:

- made a loan to a private company
- transferred shares in a private company since 1 January 2002
- made a gift of cash, assets, or property to a private company in the last five years.

No Go to next question

Yes  You will need to complete and attach a **Private Company** form (Mod PC). If you do not have this form, go to our website servicesaustralia.gov.au/forms or call Services Australia.

87 Are 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 attach a **Business details** form (Mod F). If the business owns real estate you will also need to complete and attach a **Real estate details** form (Mod R) for each property. If you do not have these forms, go to our website servicesaustralia.gov.au/forms or call Services Australia.

88 Do you (and/or your partner) own or partly own any other assets not previously mentioned on this form?

Include assets inside or outside Australia.

No Go to next question

Yes Give details below

1 Description of asset

Current market value

Currency

Asset owned by You Your partner

2 Description of asset

Current market value

Currency

Asset owned by You Your partner

3 Description of asset

Current market value

Currency

Asset owned by You Your partner

4 Description of asset

Current market value

Currency

Asset owned by You Your partner

If you (and/or your partner) have more than 4 other assets, attach a separate sheet with details.

You

Your partner

89 Please read this before answering the following question.

If you are granted an Australian pension, your payment will be issued in local currency to your bank account in New Zealand every 4 weeks. Please note that payments may be subject to fees levied by your bank, and such fees must be paid by you. You will need to provide details of a bank account that is capable of receiving direct deposit payments before you can receive any payments.

Please give details of the bank account to which you would like payments made:

Special Banking Option (SBO) You will need to arrange this with Work and Income in New Zealand.

Direct Payment Option Give details below

Name of bank

Branch where account is held

Bank code

Branch code

Account number

Suffix

Account title (names in which account is held)

Please give details of the bank account to which you would like payments made:

Special Banking Option (SBO) You will need to arrange this with Work and Income in New Zealand.

Direct Payment Option Give details below

Name of bank

Branch where account is held

Bank code

Branch code

Account number

Suffix

Account title (names in which account is held)

You

Your partner

90 Please read this before answering the following question.

Completing this section allows a person to make enquires ONLY, not to change your personal details or receive payments from Centrelink. If you wish a person to receive payments or change your personal details on your behalf, you will have to complete an **Authorising a person or organisation to enquire or act on your behalf** form (AUS221). This form can be downloaded from servicesaustralia.gov.au/forms or contact Services Australia.

Do you wish to nominate a person to make enquiries on your behalf with Services Australia?

- You do not have to nominate a person to enquire.
- The person you nominate to enquire on your behalf can be living in Australia.
- You can change this arrangement at any time.

No Go to next question

Yes Give details below

Person's full name

Person's date of birth

Day	Month	Year
/	/	

Person's relationship to you

Person's address

Country

Person's contact phone number

Country ()	Area code ()
-------------	---------------

Person's fax number

Country ()	Area code ()
-------------	---------------

Person's email

@

Person's preferred language when dealing with us

Period of authorisation

Indefinite Go to next question

Set period Give details below

From

To

Day	Month	Year
/	/	

Day	Month	Year
/	/	

Do you wish to nominate a person to make enquiries on your behalf with Services Australia?

- You do not have to nominate a person to enquire.
- The person you nominate to enquire on your behalf can be living in Australia.
- You can change this arrangement at any time.

No Go to next question

Yes Give details below

Person's full name

Person's date of birth

Day	Month	Year
/	/	

Person's relationship to you

Person's address

Country

Person's contact phone number

Country ()	Area code ()
-------------	---------------

Person's fax number

Country ()	Area code ()
-------------	---------------

Person's email

@

Person's preferred language when dealing with us

Period of authorisation

Indefinite Go to next question

Set period Give details below

From

To

Day	Month	Year
/	/	

Day	Month	Year
/	/	

Other information

91 Are you (and/or your partner) claiming Age Pension?

No **Go to 93**

Yes **Go to next question**

92 Please read this before answering the following question.


Age Pension (blind) may be paid if you are legally blind. For our purposes this means that your visual acuity:

- after correction by suitable lenses, is less than 6/60 on the Snellen Scale in both eyes, OR
- has a field of vision constricted to 10 degrees or less of arc around central fixation in the better eye irrespective of corrected visual acuity (equivalent to 1/100 white test object), OR
- has a combination of visual defects resulting in the same degree of visual impairment as that occurring in the above points.

Age Pension (blind) may be paid at a higher rate than Age Pension, depending on your circumstances.

Do you (and/or your partner) meet the definition of legal blindness as stated above?

No **Go to next question**

Yes  Attach an ophthalmologist report confirming that you (and/or your partner) meet the Australian definition of legal blindness as stated above.

Checklist

93 Use this checklist to remind you which documents you must attach.

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

Where you are asked to supply original documents, only supply copies of original documents.

	You	Your partner
Statement from educational institution confirming full-time enrolment of dependent children <i>(If required at question 27)</i>	<input type="checkbox"/>	<input type="checkbox"/>
A copy of the latest balance sheet, profit and loss statements, tax returns and your latest personal tax return <i>(If you answered Yes at question 30)</i>	<input type="checkbox"/>	<input type="checkbox"/>
A Real estate details form (Mod R) <i>(If you answered Yes at questions 31 or 32)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents which verify residence in Australia	<input type="checkbox"/>	<input type="checkbox"/>
Most recent payslip(s) <i>(If you answered Yes at question 49)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of fringe benefits <i>(If you answered Yes at question 50)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents which confirm you have stopped working for an employer <i>(If you answered Yes at question 52)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of redundancy payments <i>(If you answered Yes at question 53)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of leave entitlement payments <i>(If you answered Yes at question 54)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Latest insurance policy documents and latest statements <i>(If you answered Yes at question 56)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Income protection policy documents and latest statements <i>(If you answered Yes at question 57)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Funeral Service contract <i>(If you answered Yes at question 59)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Latest bank account statements <i>(If required at question 61)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for bonds and debentures <i>(If you answered Yes at question 62)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Loan contract and latest statements <i>(If you answered Yes at question 63)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for shares LISTED on a stock exchange <i>(If you answered Yes at question 64)</i>	<input type="checkbox"/>	<input type="checkbox"/>

	You	Your partner
Latest statements for shares NOT listed on a stock exchange (If you answered Yes at question 65)	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of managed investments (If you answered Yes at question 66)	<input type="checkbox"/>	<input type="checkbox"/>
Latest statement for margin loans for each investment (If you answered Yes at question 67)	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for approved deposit funds, deferred annuities, rollover funds and superannuation funds, tax returns and member's statements for SMSF and SAF funds (If you answered Yes at question 68)	<input type="checkbox"/>	<input type="checkbox"/>
Latest schedules for income stream products or Details of income stream product form (SA330) (If you answered Yes at question 69)	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of other investments (If you answered Yes at question 70)	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements which show details of pension or annuity (If you answered Yes at question 71)	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of payments from outside Australia (If required at question 73)	<input type="checkbox"/>	<input type="checkbox"/>
Letters/documents with details of other Australian government payments (If you answered Yes at question 76)	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of other payments (If required at question 78)	<input type="checkbox"/>	<input type="checkbox"/>
Copy of the loan agreement or contract (If you answered Yes at question 82)	<input type="checkbox"/>	<input type="checkbox"/>
A Compensation and damages form (Mod C) (If you answered Yes at questions 83 or 84)	<input type="checkbox"/>	<input type="checkbox"/>
A Private Trust form (Mod PT) (If you answered Yes at question 85)	<input type="checkbox"/>	<input type="checkbox"/>
A Private Company form (Mod PC) (If you answered Yes at question 86)	<input type="checkbox"/>	<input type="checkbox"/>
A Real estate details form (Mod R) and a Business details form (Mod F) (If you answered Yes at question 87)	<input type="checkbox"/>	<input type="checkbox"/>
An Ophthalmologist report confirming that you meet the Australian definition of legal blindness (If you answered Yes at question 92)	<input type="checkbox"/>	<input type="checkbox"/>

94 You (and your partner) 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 need to 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 servicesaustralia.gov.au/privacy

Statement

95 Statement

I declare that:

- I have read and I understand the 'Your rights' and 'Your obligations' sections in PART 1 of this claim.
- the information I have given on this form is correct.

I authorise:

- Centrelink to make enquiries necessary to establish my correct entitlement to an Australian pension.
- Work and Income in New Zealand to release any information or evidence in its possession which relates or could relate to my application for pension.

I understand that:

- information I provide will be used to assess my eligibility for payment and is protected from misuse under the privacy laws of Australia and New Zealand.
- 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 exceptions will be if I am waiting for medical evidence or statements and other forms from a third party.
- giving false or misleading information is a serious offence.

Your signature

Date

Day	Month	Year
/	/	

Your partner's signature

Date

Day	Month	Year
/	/	

What to do now

1 Keep the Notes for claiming Australian pension (PART 1) for your future reference

2 Returning your form(s)

Check that all required questions are answered and that **all forms** are signed and dated.

Important Note: You must return **all** forms and **all** supporting documents and lodge them together. If you do not return all documents, your claim may not be accepted. The only exceptions will be if you are waiting for medical evidence or statements and other forms from a third party.

You can return forms and any supporting documents:

In person/by post – to your local Work and Income office in New Zealand.

Work and Income in New Zealand will copy original documents for you and return them to you. The claim forms do not need to be copied. If you do copy the claim forms, please ensure you keep a copy, not the original. Work and Income in New Zealand will forward all forms and supporting documentation to Services Australia.

Online – submit your documents online (excluding identity documents). For more information about how to access an Online Account or how to lodge documents online, go to servicessaustralia.gov.au/submitdocumentsonline

By post – return your documents by sending them to:

**Services Australia
International Services
PO Box 7809
CANBERRA BC ACT 2610
Australia**

If you send original documents to us, we will make copies and return the original documents to you.

While you can lodge your form direct with us, lodging with the your local office of Work and Income will normally make it easier and faster for you to receive a decision on your claim.

OFFICE USE ONLY

Checklist for Work and Income in New Zealand

All relevant questions on the form have been answered

Claim has been signed and dated and relevant documents attached

Proof of Identity has been verified by:

• New Zealand claim

New Zealand Client Reference Number

OR

• Supporting documentation – Certified copies attached

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 to provide payments and services. 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

Officer's name

Officer's signature



Date

Day	Month	Year
/	/	

Contact details

Work and Income date stamp