



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 **1866 3433 086**. 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 the United States. 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**

Please keep these *Notes for claiming Australian pension (PART 1)*, pages 1 to 10, for your future reference.

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.

Mod (iA) *Income and assets*

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

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 (AUS142US) and have your doctor complete a *Treating doctor's report* (AUS109).

If you do not have these forms, you can download them from servicesaustralia.gov.au/forms or contact Services Australia.

Your partner

Services Australia recognises both same-sex and opposite-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 ensure that all questions are answered by your partner as well as yourself.

To claim an Australian pension

Call us between 8.00 am and 5.00 pm (Hobart Time), Monday to Friday.

Tell us you wish to claim an Australian pension and our staff will provide you with advice on the best way for you to proceed with your claim for an Australian pension.

You can contact us in Australia by telephone, post or fax.

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 US Social Security Administration (SSA) Field Office.

The SSA Field Office 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. The SSA Field Office will forward all forms and supporting documentation to the SSA Office of International Operations (OIO) in Baltimore MD. OIO will forward all the information 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 your local SSA Field Office 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 **1866 3433 086** between 8.00 am and 5.00 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in the USA. If this service is not available call us in Australia on **+61 3 6222 3455**.

Australian pension – what you can claim

Requirements

To claim an Australian Age 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.

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 16 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 paid contributions in the USA adds up to more than 10 years.

Pension age and claim lodgement rules

You can lodge your claim for Age Pension up to 13 weeks before you reach age pension age.

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
- 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 paid contributions in the USA adds up to more than 10 years.

'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. We will advise you if an examination is necessary.

If you are claiming Disability Support Pension, you will need to complete a ***Work capacity – Customer Information*** form (AUS142US) and have your doctor complete a ***Treating doctor's report*** (AUS109).

If you do not have these forms, you can download them from servicesaustralia.gov.au/forms or contact Services Australia.

You should claim Carer Payment if:

- you are providing full-time care for your partner, AND
- you have lived in Australia, AND
- your partner is receiving an Australian Age or Disability Support Pension.

You should claim Parenting Payment if:

- you are a widow or widower and you're still single, AND
- you have lived in Australia, AND
- you are caring for one or more children under 14 years of age who have been to Australia or have been an Australian resident.

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 your local SSA Field Office, 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 income from earnings
- 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, go to our website servicesaustralia.gov.au/income

The assets test

Most property and items you (and/or your partner) own or have interest in, including those assets held outside Australia, are taken into account when 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.

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 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, 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, go to our website 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 **1866 3433 086** 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, 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 10, for your future reference.

Claim for Australian Pension

Social Security Agreement between Australia and the USA

centrelink

OFFICE USE ONLY – Date of receipt at the US Social Security Administration Field Office

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, 15 and 22 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

Carer Payment

Disability Support Pension

Parenting Payment

Your partner

If your partner is now deceased, please fill in 'Your partner' details at questions 6, 7, 8, 9, 15 and 22 ONLY.

5 What type of payment do you wish to claim?

Age Pension

Carer Payment

Disability Support Pension

Parenting Payment

Not claiming
at this time



CLK0AUS140US 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 US Social Security Number

| | | | | | | | | | | |
|--|--|--|--|---|--|--|--|--|--|--|
| | | | | - | | | | | | |
|--|--|--|--|---|--|--|--|--|--|--|

11 Your permanent address

| |
|---------|
| |
| |
| |
| |
| Country |

12 Your postal address (if different to above)

| |
|---------|
| |
| |
| |
| |
| Country |

13 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 US Social Security Number

| | | | | | | | | | | |
|--|--|--|--|---|--|--|--|--|--|--|
| | | | | - | | | | | | |
|--|--|--|--|---|--|--|--|--|--|--|

11 Your permanent address

| |
|---------|
| |
| |
| |
| |
| Country |

12 Your postal address (if different to above)

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|---------|
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| |
| Country |

13 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

14 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 16**

15 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

14 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 16**

15 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

16 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 17**

Registered relationship **Go to 17**
(relationship registered under Australian state or territory laws)

Partnered **Go to 18**
(living together in a relationship, including de facto)

Separated **Go to 23**
(previously lived with a partner, including in a marriage, registered or de facto relationship)

Divorced **Go to 23**

Widowed **Go to 22**
(previously partnered, including in a marriage, registered or de facto relationship)

Never married or lived with a partner **Go to 27**

17 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 19

18 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

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

No **Go to next question**

Yes **Go to 25**

20 Why are you not living with your partner?

Partner's illness

Your illness

Partner in prison

Partner's employment

Other **Give details below**

21 Period not living with your partner

From Day / Month / Year

To Day / Month / Year

OR indefinite **Go to 25**

22 Please give the following details about your deceased partner.

Date of birth

Day / Month / Year

Country where partner died

Go to 27

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

No

Yes

24 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 27

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

No

Yes

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

No

Yes

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

No

Yes a

28 Do you (and/or your partner):

- own your own home,
- have a life interest in your home, or

are you (and/or your partner):

- buying your own home?

No

Yes

Dependent children

29 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. To get Parenting Payment you must have a dependent child under the age of 14.

No ► *Go to next question*

Yes ► Give details in the next column

AND



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

29 *Continued*

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

If you have more than 3 children, attach a separate sheet with details.

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.

Please attach to your claim certified copies of any documents which verify your residence in Australia.

You

30 What is your country of birth?

31 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.

32 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

| | |
|------|-------|
| Year | Month |
| / | |

2 Country

From

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

To

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

Time worked in the country

| | |
|------|-------|
| Year | Month |
| / | |

If you have lived in more than 2 countries, attach a separate sheet with details.

Your partner

30 What is your country of birth?

31 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.

32 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

| | |
|------|-------|
| Year | Month |
| / | |

2 Country

From

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

To

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

Time worked in the country

| | |
|------|-------|
| Year | Month |
| / | |

If you have lived in more than 2 countries, attach a separate sheet with details.

You

- 33** For each of the arrivals in, and departures from Australia identified at question 32, 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 Day / Month / Year | Name of ship or airline |
| | Place of arrival | |
| | Visa details on arrival Visa sub-class | Date visa granted Day / Month / Year |
| | Departure date Day / Month / Year | Name of ship or airline |
| | Place of departure | |

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

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

Your partner

- 33** For each of the arrivals in, and departures from Australia identified at question 32, 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 Day / Month / Year | Name of ship or airline |
| | Place of arrival | |
| | Visa details on arrival Visa sub-class | Date visa granted Day / Month / Year |
| | Departure date Day / Month / Year | Name of ship or airline |
| | Place of departure | |

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

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

You

- 34** If we are not able to verify your Australian residence we 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
Zip

Contact phone number
Area code ()

2 Full name

Address

Postcode
Zip

Contact phone number
Area code ()

3 Full name

Address

Postcode
Zip

Contact phone number
Area code ()

Your partner

- 34** If we are not able to verify your Australian residence we 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
Zip

Contact phone number
Area code ()

2 Full name

Address

Postcode
Zip

Contact phone number
Area code ()

3 Full name

Address

Postcode
Zip

Contact phone number
Area code ()

35 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 the USA 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 attach a copy of a bank statement or other document that shows your bank details including your account details and the name(s) of the account holder(s).

You

Name of bank – Write the full name of your bank or other financial institution.

Name of bank branch – Write the full name of your bank or other financial institution branch.

Address of bank branch

Number/Street

Town/City/ZIP/Postcode

Country

USA

Bank Sort Code/Routing Code – Sort/routing code for the branch of your bank or financial institution.

Note: this is not the SWIFT or Bank Identifier Code (BIC).

Federal Reserve routing address (4)

Federal Reserve ABA Institution ID (4)

Check digit (1)

Account number

Account type:

Demand

Savings

Account title – Write the exact name(s) in which your account is held.

Your partner

Name of bank – Write the full name of your bank or other financial institution.

Name of bank branch – Write the full name of your bank or other financial institution branch.

Address of bank branch

Number/Street

Town/City/ZIP/Postcode

Country

USA

Bank Sort Code/Routing Code – Sort/routing code for the branch of your bank or financial institution.

Note: this is not the SWIFT or Bank Identifier Code (BIC).

Federal Reserve routing address (4)

Federal Reserve ABA Institution ID (4)

Check digit (1)

Account number

Account type:

Demand

Savings

Account title – Write the exact name(s) in which your account is held.

36 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.

You

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

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

To

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

Your partner

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

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

To

| | | |
|-----|-------|------|
| Day | Month | Year |
| / | / | |

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

No **Go to 39**

Yes **Go to next question**

38 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



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

39 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 servicessaustralia.gov.au/privacy

Statement

40 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 pension or allowance.
- the US Social Security Administration to release any information or evidence in its possession which relates or could relate to my application for pension.

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 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 |
|-----|---|-------|---|------|

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

2 Returning your form

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 US Social Security Administration (SSA) Field Office.

The SSA Field Office 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. The SSA Field Office will forward all forms and supporting documentation to the SSA Office of International Operations (OIO) in Baltimore MD. OIO will forward all the information 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 your local SSA Field Office 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 **1866 3433 086** or call **+61 3 6222 3455**.