

## Purpose of this form

This form is part of your claim for an Australian payment.

The information in this form is used to calculate your rate of payment of Australian Pension or review your entitlement under Australian social security law.

## Filling in this form

- **Please use black or blue pen.**
- Print in BLOCK LETTERS.
- Mark boxes like this  with a ✓ 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.

**Important Note:** You must return this form with your claim form and **all** other supporting documents and lodge them at the same time. 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.

## Returning your form

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

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/centrelinkuploaddocs](https://servicesaustralia.gov.au/centrelinkuploaddocs)

**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.

## **For more information**

Call us direct (free of charge) on **1866 3433 086**, Monday to Friday between 8.00 am and 5.00 pm (Hobart Time). This service may not be available from all locations in the USA. 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.

**Information online** – If you would like further information on Centrelink services and payments, you can go to **[servicesaustralia.gov.au](http://servicesaustralia.gov.au)**

Personal details

1 Your name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

2 Your date of birth

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

3 Your Centrelink Reference Number (if known)

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

4 Your contact phone number

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

Country ( ) Area code ( )

5 Do you have a partner (married, registered partner, or de facto of the opposite-sex or same-sex)?

No  **Go to 12**

Yes  **Go to next question**

6 Please read this before answering the following questions.

If you are CURRENTLY in a relationship, we require your partner's details to assess your entitlement.

7 Is your partner also claiming an Australian pension?

No  **Go to 9**

Yes  **Go to next question**

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

This form

Separate form

9 Your partner's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

10 Your partner's date of birth

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

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

You can change this authority at any time.

No

Yes



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Employment income

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

**Include** all income before tax and other deductions from:


- wages
- salaries
- bonuses
- additional payments

**Do not include** self-employment or business income. This will be asked later in the form.

No  **Go to 14**

Yes  Give details below

**AND**

 Please attach a copy of your most recent payslip(s).

**1** Person working for this employer

You  Your partner

Name of employer

Address

---

---

Country

Job description

Workplace (if different from your employer's address)

Is this work:

Full-time  Part-time  Seasonal  Casual

Hours worked per fortnight  per fortnight

**Gross** amount paid per fortnight (before tax and other deductions)  per fortnight

Currency

Do you plan to stop working soon?

No

Yes  Date you plan to stop working

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

**12** *Continued*

**2** Person working for this employer

You  Your partner

Name of employer

Address

---

---

Country

Job description

Workplace (if different from your employer's address)

Is this work:

Full-time  Part-time  Seasonal  Casual

Hours worked per fortnight  per fortnight

**Gross** amount paid per fortnight (before tax and other deductions)  per fortnight

Currency

Do you plan to stop working soon?

No

Yes  Date you plan to stop working

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

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

**13** 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   Please attach documents which indicate the type of fringe benefit and its value.

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

No  Go to 20

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

---

---

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

---

---

Country

Who stopped this work? You  Your partner

Date last worked

Date last paid


Day / Month / Year

Day / Month / Year

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

15 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).

16 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).

Household contents

17 Please read this before answering the following question.

**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 your partner's) normal household contents and personal effects?

Amount

Currency

Life insurance policies


**18** 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**

 Please 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.

**19** 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.

**20** 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.

**21** 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.

Vehicles

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

**Do NOT include** a vehicle, boat, caravan or trailer in which you live.

No  Go to next question

Yes  Give details below

|                                   |  |
|-----------------------------------|--|
| <b>1</b> Make (e.g. Toyota)       | Model (e.g. Corolla)                   |
| <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"/> % |

|                                   |  |
|-----------------------------------|--|
| <b>2</b> Make (e.g. Toyota)       | Model (e.g. Corolla)                   |
| <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"/> % |

|                                   |  |
|-----------------------------------|--|
| <b>3</b> Make (e.g. Toyota)       | Model (e.g. Corolla)                   |
| <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.

Bank accounts

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

 Please attach the latest statement for each account.

|          |                                |                      |
|----------|--------------------------------|----------------------|
| <b>1</b> | 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"/> |

|          |                                |                      |
|----------|--------------------------------|----------------------|
| <b>2</b> | 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"/> |

|          |                                |                      |
|----------|--------------------------------|----------------------|
| <b>3</b> | 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.

Bonds and debentures

**24** 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**

 Please 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.


Money on loan

**25** 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**

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

**1** Who did you lend the money to?

Date lent

Amount lent

Current balance of loan

Currency

Lent by you  %

Lent by your partner  %

**2** Who did you lend the money to?

Date lent

Amount lent

Current balance of loan

Currency

Lent by you  %

Lent by your partner  %

**3** Who did you lend the money to?

Date lent

Amount lent

Current balance of loan

Currency

Lent by you  %

Lent by your partner  %

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



**26** Do you (and/or your partner) own any shares, options, rights, convertible notes, warrants or other securities **LISTED** on an Australian Stock Exchange (e.g. ASX, NSX, APX or Chi-X)\* or a stock exchange outside Australia?

**Include** shares traded in exempt stock markets.


**Do NOT include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

**AND**

 Please 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.

**27** 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.


**Do NOT include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

**AND**

 Please 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.

**28** Do you (and/or your partner) have any managed investments, inside or outside Australia?

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

**Do NOT include:**


- life insurance policies or superannuation and rollover investments
- investments purchased with a margin loan.

\* 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**

 Please attach documents which show details for each investment listed below.

|  |   |
|--|---|
| <b>1</b> Name of company                               |   |
| <input style="width: 100%;" type="text"/>              |   |
| Name of product (e.g. investment trust)                |   |
| <input style="width: 100%;" type="text"/>              |   |
| Type of product/option (e.g. balanced, growth)         |   |
| <input style="width: 100%;" type="text"/>              |   |
| APIR* code (if known)                                  | Number (if applicable)                                      |
| <input style="width: 100%;" type="text"/>              | <input style="width: 100%;" type="text"/>                   |
| Current market value of investment                     | Currency  |
| <input style="width: 100%;" type="text"/>              | <input style="width: 100%;" type="text"/>                   |
| Your share <input style="width: 50px;" type="text"/> % | Partner's share <input style="width: 50px;" type="text"/> % |

|  |   |
|--|---|
| <b>2</b> Name of company                               |   |
| <input style="width: 100%;" type="text"/>              |   |
| Name of product (e.g. investment trust)                |   |
| <input style="width: 100%;" type="text"/>              |   |
| Type of product/option (e.g. balanced, growth)         |   |
| <input style="width: 100%;" type="text"/>              |   |
| APIR* code (if known)                                  | Number (if applicable)                                      |
| <input style="width: 100%;" type="text"/>              | <input style="width: 100%;" type="text"/>                   |
| Current market value of investment                     | Currency  |
| <input style="width: 100%;" type="text"/>              | <input style="width: 100%;" type="text"/>                   |
| Your share <input style="width: 50px;" type="text"/> % | Partner's share <input style="width: 50px;" type="text"/> % |


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

**29** 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**

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

|   |  |   |
|---|--|---|
| <b>1</b> Name of margin loan company      |  |   |
| <input style="width: 100%;" type="text"/> |  |   |
| Current portfolio                         | APIR code (if known)                         |   |
| <input style="width: 100%;" type="text"/> | \$ <input style="width: 100%;" type="text"/> |   |
| Current margin loan balance               | Your share                                   | Partner's share                             |
| <input style="width: 100%;" type="text"/> | <input style="width: 50px;" type="text"/> %  | <input style="width: 50px;" type="text"/> % |

|   |  |   |
|---|--|---|
| <b>2</b> Name of margin loan company      |  |   |
| <input style="width: 100%;" type="text"/> |  |   |
| Current portfolio                         | APIR code (if known)                         |   |
| <input style="width: 100%;" type="text"/> | \$ <input style="width: 100%;" type="text"/> |   |
| Current margin loan balance               | Your share                                   | Partner's share                             |
| <input style="width: 100%;" type="text"/> | <input style="width: 50px;" type="text"/> %  | <input style="width: 50px;" type="text"/> % |

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

**30** 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.

**31 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.

See the table below for age pension qualifying age.

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

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
- any money held in a 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

31 *Continued*

|   |  |
|---|--|
| <b>2</b> Name of institution/fund manager |  |
| <input type="text"/>                      |  |
| Name of fund                              |  |
| <input type="text"/>                      |  |
| Product reference number                  | Date of joining/investment   |
| <input type="text"/>                      | Day / Month / Year   |
| Current market value                      | Owned by:  |
| \$ <input type="text"/>                   | You <input type="checkbox"/> Your partner <input type="checkbox"/> |

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

Income stream products

32 **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).


32 *Continued*

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 [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

|  |                    |
|--|--------------------|
| <b>1</b> Name of product provider/SMSF/SAF                                   |                    |
| <input type="text"/>   |                    |
| Type of income stream  |                    |
| <input type="text"/>   |                    |
| Product reference number   | Commencement date  |
| <input type="text"/>   | Day / Month / Year |
| Owned by: You <input type="checkbox"/> Your partner <input type="checkbox"/> |                    |

|  |                    |
|--|--------------------|
| <b>2</b> Name of product provider/SMSF/SAF                                   |                    |
| <input type="text"/>   |                    |
| Type of income stream  |                    |
| <input type="text"/>   |                    |
| Product reference number   | Commencement date  |
| <input type="text"/>   | Day / Month / Year |
| Owned by: You <input type="checkbox"/> Your partner <input type="checkbox"/> |                    |

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

Other investments

**33** 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**

 Please attach documents which show details for each investment listed below.

**1** Type 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** Type 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.

Gifting

**34** 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** 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, care, second home, land, farm)

|                    |                      |
|--------------------|----------------------|
| Date given or sold | What it was worth    |
| Day / Month / Year | <input type="text"/> |

|                                  |                      |
|----------------------------------|----------------------|
| Amount you received for the item | Currency             |
| <input type="text"/>             | <input type="text"/> |

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

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, care, second home, land, farm)

|                    |                      |
|--------------------|----------------------|
| Date given or sold | What it was worth    |
| Day / Month / Year | <input type="text"/> |

|                                  |                      |
|----------------------------------|----------------------|
| Amount you received for the item | Currency             |
| <input type="text"/>             | <input type="text"/> |

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

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.

Other pension-type payments from outside Australia

**35** 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**



Please attach the most recent document showing payment details for each of the pensions, benefits or allowances paid (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

**35** *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) have more than 3 types of payments, attach a separate sheet with details.

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

No  ► *Go to next question*

Yes  ► Give details below

|                              |  |
|------------------------------|--|
| <b>1</b> Type of payment     |  |
| <input type="text"/>         |  |
| Country claiming from        |  |
| <input type="text"/>         |  |
| When are you going to claim? | Who is claiming this payment?                                      |
| Day / Month / Year           | You <input type="checkbox"/> Your partner <input type="checkbox"/> |

|                              |  |
|------------------------------|--|
| <b>2</b> Type of payment     |  |
| <input type="text"/>         |  |
| Country claiming from        |  |
| <input type="text"/>         |  |
| When are you going to claim? | Who is claiming this payment?                                      |
| Day / Month / Year           | You <input type="checkbox"/> Your partner <input type="checkbox"/> |

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

**Money from boarders and lodgers**

**37** 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 in the next column

**37** *Continued*

|   |                                       |
|---|---------------------------------------|
| <b>1</b> 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                    |

|   |                                       |
|---|---------------------------------------|
| <b>2</b> 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                    |

|   |                                       |
|---|---------------------------------------|
| <b>3</b> 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                    |

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


**38** Do you (and/or your partner) receive payments from Australian Government sources other than Centrelink income support payments?

**For example**, an Australian family assistance payment.

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

Who pays it?

Reference number (if known) Date commenced (if known)

|                      |                    |
|----------------------|--------------------|
| <input type="text"/> | Day / Month / Year |
|----------------------|--------------------|

Paid to: You  Your partner

**2** Type of payment

Who pays it?

Reference number (if known) Date commenced (if known)

|                      |                    |
|----------------------|--------------------|
| <input type="text"/> | Day / Month / Year |
|----------------------|--------------------|

Paid to: You  Your partner

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

Lump sum payment

**39** 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 these in a later question.

No  Go to next question

Yes  Give details below

**1** Type of lump sum

Amount paid

Currency

Date paid

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

Payment received by:

You  Your partner

**2** Type of lump sum

Amount paid

Currency

Date paid

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

Payment received by:

You  Your partner

**3** Type of lump sum

Amount paid

Currency

Date paid

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

Payment received by:

You  Your partner

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



## Other payments

- 40** Do you (and/or your partner) receive any income from other sources, not previously mentioned on this form?

**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 below

**AND**

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

**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

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

## Cash holdings

- 41** 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


|                                   |  |
|-----------------------------------|--|
| Total amount                      | Currency                               |
| <input type="text"/>              | <input type="text"/>                   |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

## Compensation

- 42** Are you (and/or your partner) receiving or entitled to claim an insurance payout, damages, or compensation (if made wholly or partly in respect of lost earnings or lost capacity to earn resulting from personal injury)?

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 [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

## Property

- 43** Do you (and/or your partner) own or partly own any property inside or outside Australia, other than the home in which you live?

No  Go to next question

Yes

 You will need to complete and attach a **Real estate details form (Mod R)**. A separate form must be used for each property. If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

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

You 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 5 years
- relinquished control of a private trust since 1 January 2002
- a private annuity
- a life interest
- an interest in a deceased estate.

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 [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

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

You 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 5 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 [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**46** 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 [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

Other assets

**47** 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

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

Accommodation

48 Which of the following best describes where you live?

In a home you (and/or your partner) own  **Go to 49**  
This includes paying it off (mortgage).

In a place where you pay private rent or board and lodging  **Go to 63**

In a retirement village  **Go to 53**

In accommodation which you have the right to use free for life  
Such as a granny flat to use for life.  **Go to 55**

In a residential aged care home (nursing home or hostel) which provides nursing care  **Go to 56**

Other (give details below)  **Go to 63**

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

Your principal home

49 Is the home on a block of land larger than 2 hectares (5 acres)?

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 **servicesaustralia.gov.au/forms**

50 Does the property that you (and/or your partner) live on have more than one title document?

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 **servicesaustralia.gov.au/forms**

51 Is any part of the home property used for income producing purposes?

**Do not include** rent from boarders or lodgers.

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 **servicesaustralia.gov.au/forms**

52 Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia?

No  **Go to 63**

Yes  How many other properties in and/or outside Australia do you (and/or your partner) own or have an interest in?

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

 You will need to complete and attach a **Real estate details form (Mod R)** for each property.  
If you do not have this form, go to **servicesaustralia.gov.au/forms**  
▶ **Go to 63**

Retirement village

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

No  ► *Go to next question*

Yes  ► How much?

Currency

54 Do you still own your former home?

No  ► **Go to 63**

Yes  ►



You will need to complete and attach a **Real estate details** form (Mod R).

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

► **Go to 63**

Life interest

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

No  ► **Go to 63**

Yes  ► Give details below

Name of person or organisation

Address

---

---

Country

Date paid/transferred

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

Amount paid

Currency

**AND/OR**

What asset was transferred

Market value of assets transferred

Currency

► **Go to 63**

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

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

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

57 Do you still own your former home?

No  ► **Go to 63**

Yes  ► *Go to next question*

58 Do you have a partner?

No  ► **Go to 62**

Yes  ► *Go to next question*

59 Does your partner still live in your former home?

No  ► *Go to next question*

Yes  ► **Go to 63**

60 What date did your partner leave your former home?

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

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

No  ► **Go to 63**

Yes  ►



You will need to complete and attach a **Real estate details** form (Mod R).

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

► **Go to 63**

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

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 [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**63** 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             |
|--|--------------------------|--------------------------|
| Most recent payslip(s)<br><i>(If you answered Yes at question 12)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of fringe benefits<br><i>(If you answered Yes at question 13)</i>                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of stopped working for an employer<br><i>(If you answered Yes at question 14)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of redundancy payments<br><i>(If you answered Yes at question 15)</i>             | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of leave entitlement payments<br><i>(If you answered Yes at question 16)</i>      | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest insurance policy documents and latest statements<br><i>(If you answered Yes at question 18)</i>         | <input type="checkbox"/> | <input type="checkbox"/> |
| Income protection policy documents and latest statements<br><i>(If you answered Yes at question 19)</i>        | <input type="checkbox"/> | <input type="checkbox"/> |
| Funeral Service contract<br><i>(If you answered Yes at question 21)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest bank account statements<br><i>(If required at question 23)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest statements for bonds and debentures<br><i>(If you answered Yes at question 24)</i>                      | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Loan contract and latest statements</i><br><i>(If you answered Yes at question 25)</i>                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest statements for shares LISTED on a stock exchange<br><i>(If you answered Yes at question 26)</i>         | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest statements for shares NOT listed on a stock exchange<br><i>(If you answered Yes at question 27)</i>     | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of managed investments<br><i>(If you answered Yes at question 28)</i>             | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest statement for margin loans for each investment<br><i>(If you answered Yes at question 29)</i>           | <input type="checkbox"/> | <input type="checkbox"/> |

**63** *Continued*

|  | You                      | Your partner             |
|--|--------------------------|--------------------------|
| Copy of the loan agreement or contract<br><i>(If you answered Yes at question 30)</i>  | <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<br><i>(If you answered Yes at question 31)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| Latest schedules for income stream products or <b>Details of income stream product</b> form (SA330)<br><i>(If you answered Yes at question 32)</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of other investments<br><i>(If you answered Yes at question 33)</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of payments from outside Australia<br><i>(If required at question 35)</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| Letters/documents with details of other Australian government payments<br><i>(If you answered Yes at question 38)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| Documents which show details of other payments<br><i>(If you answered Yes at question 40)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| A <b>Compensation and damages</b> form (Mod C)<br><i>(If you answered Yes at question 42)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| A <b>Real estate details</b> form (Mod R)<br><i>(If you answered Yes at questions 43, 46, 49, 50, 51, 52, 54, 61 and 62)</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| A <b>Private Trust</b> form (Mod PT)<br><i>(If you answered Yes at question 44)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| A <b>Private Company</b> form (Mod PC)<br><i>(If you answered Yes at question 45)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| A <b>Business details</b> form (Mod F)<br><i>(If you answered Yes at question 46)</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| A copy of the latest balance sheet, profit and loss statements, tax returns and your (and/or your partner's) latest personal tax return<br><i>(If you answered No at question 50)</i>                                | <input type="checkbox"/> | <input type="checkbox"/> |

**64 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](http://servicesaustralia.gov.au/privacy)

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Statement

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**65 Statement**

**I declare that:**

- the information I have provided on this form is correct.

**I understand that:**

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

Your signature



Date

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

Your partner's signature



Date

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