

# Claim for Age Pension and Pension Bonus (SA002)

## When to use this form



Use this form to claim the following:

### Age Pension

The Age Pension provides income support and access to a range of concessions for eligible older Australians. The Age Pension is paid at different rates depending on a person's circumstances and includes incentives for people to maximise their overall income.

### Pension Bonus

The Pension Bonus is a tax free lump sum payment for registered members of the Pension Bonus Scheme who have deferred claiming Age Pension and stayed in paid work. **The scheme is closed to new registrations.** If you are registered in the scheme, you must claim the bonus at the same time you claim Age Pension. Conditions apply.

## Online services



### Completing this form online is faster and easier.

You can claim Age Pension using your Centrelink online account through myGov. For help, go to [servicesaustralia.gov.au/onlineguides](https://servicesaustralia.gov.au/onlineguides)

If you do not have a myGov account, you can create one at [my.gov.au](https://my.gov.au) and link it to your Centrelink online account.

## What else you may need to provide

You may need to provide identity documents. For a list of acceptable documents, refer to 'Confirming your identity' in the **Information you need to know about your claim for Age Pension and Pension Bonus (Ci006)** or go to [servicesaustralia.gov.au/identity](https://servicesaustralia.gov.au/identity)

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

## For more information



Refer to the **Information Booklet** at [servicesaustralia.gov.au/agepension](https://servicesaustralia.gov.au/agepension)

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

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

Call charges may apply.

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

## Partner Permitted to Enquire

Allowing your partner to enquire on your behalf, may save you time when dealing with us. It will let you and your partner use more self-service functions online and over the phone.

If you give your partner **permission to enquire**, it will allow your partner to ask questions about your Centrelink payments and services. They could ask us:

- your current rate of payment
- the reason your payment has stopped
- the reason your payment has gone up or down, for example, income and assets, debt and back payment information.

They can tell us how much you earned, changes in your circumstances and view your details online.

*Continued*

They **cannot**:

- act on your behalf with Centrelink
- apply for payments for you
- complete and sign forms and statements on your behalf
- come to appointments for you.

You have a right to have your personal information kept private. For more information, go to [servicesaustralia.gov.au/privacy](https://servicesaustralia.gov.au/privacy)

**Changing your partner's permission to enquire is your choice and you can change this permission at any time.**

## Forms in your claim pack

In your claim pack, you should have the following:

- **Claim for Age Pension and Pension Bonus (SA002)** form
- **Income and Assets (SA369)** form.

## Filling in this form

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

## How to claim

If you have a partner and you are both claiming Age Pension, you may choose to complete one claim pack together or complete a separate claim pack for each person.

If your partner is not claiming Age Pension they still need to provide their details. They can do so on this form or a separate **Partner Details (Mod P)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](https://servicesaustralia.gov.au/forms)

Complete the claim form(s) and any additional forms required. You may choose to use an accountant or financial adviser to complete your **Income and Assets (SA369)** form but you must sign it. If you need other people to assist with completing your forms, make sure you give them the forms as soon as possible.

To make sure you are paid from the earliest possible date, you should lodge your claim as soon as possible. You may lodge your claim form without the other forms and documentation, however, they will need to be provided before the claim can be processed. Age Pension claims can be lodged up to 13 weeks before you reach Age Pension age.

## Age Pension for people who are permanently blind

Make an appointment with the ophthalmologist/optometrist who usually treats you (and/or your partner). You should have been given a **Request for Ophthalmologist/Optometrist Report (SA013)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](https://servicesaustralia.gov.au/forms)

When you (and/or your partner) make the appointment, tell the receptionist that you (and/or your partner) need the optician to complete a form for us, as they may need to allow more time. The optician may complete the report and give it back to you (or your partner) or they may send it directly to us. Make sure the report has your (or your partner's) name and address on it.

## Department of Veterans' Affairs Disability Pension payment option

If you (and/or your partner) currently get a Disability Pension from the Department of Veterans' Affairs (DVA), you can both choose to have your Age Pension paid by DVA instead of us. You will need to complete the claim forms but **lodge them with DVA** (contact your local DVA office for lodgement details).

## Age Pension

- 1 Do you have a partner?  
No  **Go to 4**  
Yes  We require your partner's details to assess your claim. *Go to next question*
- 2 Is your partner also claiming Age Pension?  
No  Your partner can provide their details on this form or a separate **Partner details (Mod P)** form. *Go to next question*  
Yes  Your partner can claim on this form or on a separate forms. *Go to next question*
- 3 Indicate if your partner is using the this form or a separate form for a claim or to provide their details.  
This form   
Separate form

### You

- 4 Your name  
Mr  Mrs  Miss  Ms  Other   
Family name   
First given name   
Second given name
- 5 Have you been known by any other name(s) (for example, name at birth, name before marriage, previous married name, Aboriginal or skin name, alias, adoptive name, foster name)?  
No  *Go to next question*  
Yes  Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

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

### Your partner

- 4 Your name  
Mr  Mrs  Miss  Ms  Other   
Family name   
First given name   
Second given name
- 5 Have you been known by any other name(s) (for example, name at birth, name before marriage, previous married name, Aboriginal or skin name, alias, adoptive name, foster name)?  
No  *Go to next question*  
Yes  Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

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



CLK0SA002 2009

**You**

6 Your gender

Male

Female

7 Your date of birth

/ /

 If you are claiming Age Pension, provide proof of your date of birth.

8 Your permanent address

.....  
.....  
Postcode

9 Your postal address (if different to above)

.....  
.....  
Postcode

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

Providing a mobile phone number or an email address means you may receive SMS or emails from us. To read the terms and conditions, go to [servicesaustralia.gov.au/em](http://servicesaustralia.gov.au/em)

Your contact details

Home phone number ( )

Is this a silent number? No  Yes

Mobile phone number

Fax number ( )

Work phone number ( )

Alternative phone number ( )

Email

**Your partner**

6 Your gender

Male

Female

7 Your date of birth

/ /

 If you are claiming Age Pension, provide proof of your date of birth.

8 Your permanent address

.....  
.....  
Postcode

9 Your postal address (if different to above)

.....  
.....  
Postcode

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

Providing a mobile phone number or an email address means you may receive SMS or emails from us. To read the terms and conditions, go to [servicesaustralia.gov.au/em](http://servicesaustralia.gov.au/em)

Your contact details

Home phone number ( )

Is this a silent number? No  Yes

Mobile phone number

Fax number ( )

Work phone number ( )

Alternative phone number ( )

Email

## You

- 11** This question is voluntary and will not affect your payment. If you do answer, the information will help us to continue to improve services to Aboriginal and Torres Strait Islander Australians.

Are you of Aboriginal or Torres Strait Islander Australian descent?

If you are of both Aboriginal and Torres Strait Islander Australian descent, tick both 'Yes' boxes.

No

Yes – Aboriginal Australian

Yes – Torres Strait Islander Australian

- 12** This question is voluntary and will not affect your payment. If you do answer, the information will help us to continue to improve services to people of Australian South Sea Islander descent.

Australian South Sea Islanders are the descendants of Pacific Islander labourers brought from the Western Pacific in the 19th Century.

Are you of Australian South Sea Islander descent?

No

Yes

- 13** Do you need an interpreter when dealing with us? This includes an interpreter for people who have a hearing or speech impairment.

No  **Go to 16**

Yes  **Go to next question**

- 14** What is your preferred spoken language?

- 15** What is your preferred written language?

- 16** If you answered 'Yes' at question 1, do you give permission for your partner to speak with us on your behalf?

For more information, read page 1.

No

Yes

- 17** Do you want to authorise another person or organisation to make enquiries, get payments and/or act on your behalf?

No  **Go to next question**

Yes

 You can do this online or fill in and return an **Authorising a person or organisation to enquire or act on your behalf (SS313)** form. If you want to do this online, use your Centrelink online account. If you want a form or more information about nominee arrangements, go to [servicesaustralia.gov.au/nominees](http://servicesaustralia.gov.au/nominees)

## Your partner

- 11** This question is voluntary and will not affect your payment. If you do answer, the information will help us to continue to improve services to Aboriginal and Torres Strait Islander Australians.

Are you of Aboriginal or Torres Strait Islander Australian descent?

If you are of both Aboriginal and Torres Strait Islander Australian descent, tick both 'Yes' boxes.

No

Yes – Aboriginal Australian

Yes – Torres Strait Islander Australian

- 12** This question is voluntary and will not affect your payment. If you do answer, the information will help us to continue to improve services to people of Australian South Sea Islander descent.

Australian South Sea Islanders are the descendants of Pacific Islander labourers brought from the Western Pacific in the 19th Century.

Are you of Australian South Sea Islander descent?

No

Yes

- 13** Do you need an interpreter when dealing with us? This includes an interpreter for people who have a hearing or speech impairment.

No  **Go to 16**

Yes  **Go to next question**

- 14** What is your preferred spoken language?

- 15** What is your preferred written language?

- 16** Do you give permission for your partner to speak with us on your behalf?

For more information, read page 1.

No

Yes

- 17** Do you want to authorise another person or organisation to make enquiries, get payments and/or act on your behalf?

No  **Go to next question**

Yes

 You can do this online or fill in and return an **Authorising a person or organisation to enquire or act on your behalf (SS313)** form. If you want to do this online, use your Centrelink online account. If you want a form or more information about nominee arrangements, go to [servicesaustralia.gov.au/nominees](http://servicesaustralia.gov.au/nominees)

**You**

**18** What country are you currently living in?

The country of residence is where you normally live on a long term basis.

Australia  Go to next question

Other  Country of residence

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

This question will help us to verify your Australian residence.

No  Go to next question

Not applicable – never travelled to Australia  Go to next question

Yes  Give details below


Year you last entered Australia

Passport number

Country of issue

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

No

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

Yes  Go to 29

**21** What is your country of birth?

**22** What is your country of citizenship?

Australia  Date citizenship granted

 / /  ▶ Go to next question

Other  Give details below

Country of citizenship

Date citizenship granted

 / / 

**Your partner**

**18** What country are you currently living in?

The country of residence is where you normally live on a long term basis.

Australia  Go to next question

Other  Country of residence

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

This question will help us to verify your Australian residence.

No  Go to next question

Not applicable – never travelled to Australia  Go to next question

Yes  Give details below


Year you last entered Australia

Passport number

Country of issue

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

No

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

Yes  Go to 29

**21** What is your country of birth?

**22** What is your country of citizenship?

Australia  Date citizenship granted

 / /  ▶ Go to next question

Other  Give details below

Country of citizenship

Date citizenship granted

 / / 

**23** Read this if you are not claiming on this form.

If you have never lived in Australia, do not complete question 24 to question 29.

**You**

**24** What type of visa did you arrive on?

Permanent  *Go to next question*

Temporary  *Go to next question*

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

Not sure  **Go to 26**

**25** Your visa details on arrival

Visa sub class

Date visa granted

**26** Has your visa changed since you arrived in Australia?

No  *Go to next question*

Yes  **Most recent visa details**

Visa sub class

Date visa granted

**27** When did you most recently start living in Australia?

**28** Did you start living in Australia before 1965?

No  *Go to next question*

Yes  **Give details below**

Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

**Your partner**

**24** What type of visa did you arrive on?

Permanent  *Go to next question*

Temporary  *Go to next question*

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

Not sure  **Go to 26**

**25** Your visa details on arrival

Visa sub class

Date visa granted

**26** Has your visa changed since you arrived in Australia?

No  *Go to next question*

Yes  **Most recent visa details**

Visa sub class

Date visa granted

**27** When did you most recently start living in Australia?

**28** Did you start living in Australia before 1965?

No  *Go to next question*

Yes  **Give details below**

Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

**You**

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

We need to know if you have lived in any countries other than Australia. '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.

Have you **ever** lived outside Australia for any period?

No  Go to next question

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

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

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

| Country | Date from |
|---------|-----------|
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |

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

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

The account must be in your name. A joint account is acceptable.

Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

**Your partner**

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

We need to know if you have lived in any countries other than Australia. '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.

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No  Go to next question

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

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|---------|-----------|
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |
|         | / /       |

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

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

**Only give details if you are also claiming Age Pension on this form.**

The account must be in your name. A joint account is acceptable.

Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of



**You**

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

The pension supplement helps you to meet the costs of your daily household and living expenses. It is automatically paid each fortnight with your regular pension.

You have the option to receive part of the pension supplement on a quarterly basis. This part is known as the minimum pension supplement amount. You may find this option useful for budgeting purposes. If you choose this option, the minimum pension supplement amount accrues daily during the quarter and is paid as soon as possible after 20 March, 20 June, 20 September and 20 December with your fortnightly pension payment.

The option to get the minimum pension supplement as a fortnightly payment or quarterly payment can be changed at any time.

How often do you wish to receive the minimum pension supplement amount?

Fortnightly

Quarterly

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

You may not be paid if you do not give us your tax file number (TFN). If you do not have a TFN, or do not know what yours is, you can apply for one through the Australian Taxation Office.

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

Have you given us your tax file number before?

No  Go to next question

Not sure  Go to next question

Yes  Go to 35

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

No  Go to **ato.gov.au**

Yes  Your tax file number

--

**Your partner**

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

**Only give details if you are also claiming Age Pension on this form.**

The pension supplement helps you to meet the costs of your daily household and living expenses. It is automatically paid each fortnight with your regular pension.

You have the option to receive part of the pension supplement on a quarterly basis. This part is known as the minimum pension supplement amount. You may find this option useful for budgeting purposes. If you choose this option, the minimum pension supplement amount accrues daily during the quarter and is paid as soon as possible after 20 March, 20 June, 20 September and 20 December with your fortnightly pension payment.

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

Have you given us your tax file number before?

No  Go to next question

Not sure  Go to next question

Yes  Go to 35

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

No  Go to **ato.gov.au**

Yes  Your tax file number

--

**You**

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

If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your taxable payment.

You can change or cancel your tax deduction at any time using your Centrelink online account.

If you are not sure how much tax to have taken out of your payment, contact the Australian Taxation Office.

Do you want tax taken out each fortnight?

No  Go to next question

Yes  Give details below

**Tick one only**

A set amount (must be whole dollars)  \$  .00 per fortnight

A percentage (%) of my payment   % per fortnight

**Your partner**

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

**Only answer this question if you are also claiming Age Pension on this form.**

If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your taxable payment.

You can change or cancel your tax deduction at any time using your Centrelink online account.

If you are not sure how much tax to have taken out of your payment, contact the Australian Taxation Office.

Do you want tax taken out each fortnight?

No  Go to next question

Yes  Give details below

**Tick one only**

A set amount (must be whole dollars)  \$  .00 per fortnight

A percentage (%) of my payment   % per fortnight

**36** Tick **ONE** of the boxes below to tell us about your relationship status right now.

If you have **ever been separated**, give the date that you most recently got back together with your partner.

**Married**

Date married or reconciled with your partner

/ /

▶ **Go to 37**

**Registered relationship**

(your relationship is registered under Australian state or territory law)

Date registered or reconciled with your partner

/ /

▶ **Go to 37**

**De facto**

(your relationship is similar to a married couple but you are not married or in a registered relationship)

Date you started your relationship or reconciled with your partner

/ /

▶ **Go to 37**

**Separated**

(previously in a marriage, registered or de facto relationship)

Date of last separation

/ /

▶ **Go to 41**

**Divorced**

Date of divorce

/ /

▶ **Go to 41**

**Widowed**

(previously in a marriage, registered or de facto relationship)

Date of partner's death

/ /

▶ **Go to 40**

**Never married or lived with a partner**

**Go to 45**

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

No  **Go to next question**

Yes  **Go to 47**

**38** Why are you not living with your partner?

Partner's illness

Your illness

Partner in prison

Partner's employment

Other  **Give details below**

.....  
.....

**39** Period not living with your partner

From / /

To / / or indefinite

▶ **Go to 45**

**40** Give the following details about your deceased partner.

Full Name

.....  
.....

Date of birth

/ /

▶ **Go to 45**

**41** Your ex-partner's family name

.....

First given name

.....

Second given name

.....

**42** Do you live in the same home as your ex-partner?

No  **Go to 44**

Yes  **Go to next question**

**43** Are you concerned about your safety if forms are issued to your ex-partner?

No



**Both you and your ex-partner** each need to complete and return a separate **Relationship details – Separated under one roof (SS293)** form.

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

▶ **Go to 45**

Yes



**Only you** need to complete and return a separate **Relationship details – Separated under one roof (SS293)** form.

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

▶ **Go to 45**

**44** Your ex-partner's current address (if known)

.....  
.....  
.....  
Postcode

## Your living arrangements

- 45** Do you share your accommodation with anyone other than immediate family members, for example, partner, child, parent or guardian?

No  **Go to 47**

Yes  **Go to next question**

- 46** **Read** this before answering the following question.

We need full details about your living arrangements to work out your correct payment.

The answers to these questions will help us decide if we need more information from you.

Give details of each person who shares your accommodation.

**Include anyone who:**

- regularly stays any number of nights per week
- uses your home as a base (for example, truck drivers, miners, flight attendants or members of the armed forces).

**Do not include** immediate family members.

*Continued*

### Person 1 Name

Age

Gender

Male

Female

When did you start sharing with this person?

 /  / 

What is your relationship to this person?

Have you and this person shared accommodation at another address?

No

Yes

Have you and this person previously lived together as a couple (for example, married, partnered, de facto or in a registered relationship)?

No

Yes

SS293

Do you and this person share the parenting/ guardianship of any children?

No

Yes

SS284

Have you and this person ever had any joint financial commitments (for example, joint bank account, mortgage or other loans)?

No

Yes  **Give details below**

SS284

---

If you participate in activities jointly with this person, are you considered to be a couple?

No

Yes  **Give details below**

SS284

---

Are you concerned about your safety if forms are issued to this person?

No

Yes

Continued

**Person 2** Name

Age  Gender Male  Female

When did you start sharing with this person?  
 /  /

What is your relationship to this person?

Have you and this person shared accommodation at another address?  
 No   
 Yes

Have you and this person previously lived together as a couple (for example, married, partnered, de facto or in a registered relationship)?  
 No   
 Yes   
 SS293

Do you and this person share the parenting/ guardianship of any children?  
 No   
 Yes   
 SS284

Have you and this person ever had any joint financial commitments (for example, joint bank account, mortgage or other loans)?  
 No   
 Yes  Give details below  
 SS284

If you participate in activities jointly with this person, are you considered to be a couple?  
 No   
 Yes  Give details below  
 SS284

Are you concerned about your safety if forms are issued to this person?  
 No   
 Yes

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

**About your home**

The responses to these questions are used to determine your rate of payment and eligibility for rent assistance.


**47** Do you (and/or your partner) own a home that you do not live in?  
 No  **Go to 50**  
 Yes  **Go to next question**

**48** What is the reason you do not live in the home?  
 You or your children are studying   
 Receiving medical treatment   
 Receiving care from a person in a private home   
 Receiving care in a nursing home   
 Providing care to a person in a private home   
 Overseas absence   
 Other  Give details below

**49** Have you (and/or your partner) sold your former home within the last 24 months and intend to purchase or construct a new home?  
 No  **Go to next question**  
 Yes  Give details below

What was the date of settlement?  
 /  /

What was the amount you received after any mortgage and costs were taken out of the sale price?  
 \$

 Provide documents to verify the details of the sale (for example, settlement statement). Copies are acceptable.

What is the total amount you have used, or intend to use, on the purchase or construction of your new home (cannot exceed the amount of the sale proceeds)?  
 \$

Expected date of completion of your new home  
 /  /

**50** Which of the following best describes where you (and your partner) live?

In a place where you (and/or your partner) pay private rent – this includes site or mooring fees.  **Go to 79**

In a home you (and/or your partner) own or you own jointly with another person – this can include:

- paying it off (mortgage)
- a caravan, mobile home or boat

 **Go to 51**

In a home owned by:

- a company in which you are a shareholder or director
- a trust in which you or a member of your family are a potential beneficiary or are named in the trust deed

 **Go to 83**

In public housing, for example, housing owned by the Housing Authority. This does not include paying rent to a community housing organisation.  **Go to 52**

In a boarding house, guest house, hostel, hotel, campus or similar  **Go to 75**

In a hospital or home for people with disabilities  **Go to 75**

In an aged care home or nursing home  **Go to 55**

In a retirement village  **Go to 63**

In accommodation which you (and/or your partner) have the right to use for life  **Go to 67**

In accommodation where you pay no rent  **Go to 83**

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

|                 |
|-----------------|
|                 |
|                 |
|                 |
| <b>Go to 79</b> |

**51** Do you pay site, ground or mooring fees for your (and your partner's) home (this could be for a caravan, mobile home or boat)?

No  **Go to 83**

Yes  **Go to 73**

**52** Is your (or your partner's) name on the rental contract or lease agreement?

No  **Go to next question**

Yes  **Go to 83**

**53** Is the primary tenant paying the market rate of rent?

No  **Go to next question**

Not sure  **Go to next question**

Yes  **Go to 73**

**54** Do you (and your partner) live with the primary tenant and your (and/or your partner's) income has been taken into account by the public housing authority when calculating the rent?

No  **Go to 83**

Yes  **Go to 73**

### Aged care home or nursing home

**55** What is the name of the aged care home or nursing home?

|  |
|--|
|  |
|  |

**56** What date did you (and/or your partner) move in?

| You | Your partner |
|-----|--------------|
| / / | / /          |

**57** How long will you (and/or your partner) be staying?

Long term or indefinitely

You  Your partner  **Go to 59**

Short term or temporary respite care

You  Your partner  **Go to next question**

**58** What date do you (and/or your partner) expect to leave?


| You | Your partner |
|-----|--------------|
| / / | / /          |

**Go to 83**

**59** Does this aged care hostel or nursing home receive an Australian Government subsidy for your accommodation?

Check with your service provider to find out if they receive any Australian Government subsidy.

No

 Provide documents showing the details of the entry agreement for daily fees. Copies are acceptable.  
**Go to next question**

Not sure  **Go to next question**

Yes  **Go to next question**

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

Payments for accommodation may include:

- Accommodation Bond
- Accommodation Charge
- Refundable Accommodation Deposit (RAD)
- Daily Accommodation Payment (DAP)
- Daily Accommodation Contribution (DAC)
- Refundable Accommodation Contribution (RAC).

Did you (and/or your partner) pay, or agree to pay, a daily payment or a lump sum (either by instalments or in full) for your accommodation to the Aged Care Provider?

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

No  **Go to 83**

Yes  Amount of payment

\$

 Provide a copy of the signed accommodation agreement(s).

**61** Did you (and/or your partner) make a gift and/or loan in addition for the right to your accommodation?

No  **Go to 83**

Yes  *Go to next question*

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

Amount of gift

\$

Amount of loan

\$

► **Go to 83**

**Retirement village**

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

You

/ /

Your partner

/ /


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

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

No  *Go to next question*

Yes  Amount of entry contribution

\$

 Provide a copy of the signed contract or agreement.

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

No  **Go to 73**

Yes  *Go to next question*

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

Amount of gift

\$

Amount of loan

\$

► **Go to 73**

## Life interest

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

No  ► *Go to next question*

Yes  ► **Go to 69**

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

Inherited the life interest  ► **Go to 83**

A formal agreement documenting the life interest  ► **Go to 83**

An informal arrangement, no rent paid  ► **Go to 83**

An informal arrangement to live at a child's home and pay rent  ► **Go to 79**

Other  ► Give details below

|                   |
|-------------------|
|                   |
|                   |
| <b>► Go to 79</b> |

**69** What are the details of the person or organisation that was paid money or assets were transferred to?

Full name (of the person or organisation)

Address



Postcode

**70** What was the amount paid?

**71** What (if any) assets were transferred?




**72** What was the market value of assets transferred?

## Living with other people

Sharing your accommodation means that you have the right to use a kitchen, bedroom or bathroom with one or more persons. This includes **all** family members (except children which you are paid family assistance for), people who regularly stay at your accommodation and people who work away from home (for example, truck drivers, miners, flight attendants or members of the armed forces).

**73** Do you (and/or your partner) share your accommodation with other people?

No  ► **Go to 75**

Yes  ► Give details below

|   |  |
|---|--|
| <b>1</b> Person's name  | Age  |
| <input style="width: 95%; height: 25px;" type="text"/>        | <input style="width: 40%; height: 25px;" type="text"/>   |
| Date they move in   | Relationship to you                                      |
| <input style="width: 80%; height: 25px;" type="text"/>        | <input style="width: 95%; height: 25px;" type="text"/>   |
| <b>Their share of the rent/lodgings</b>                       | <b>Do they own the home?</b>                             |
| \$ <input style="width: 60%; height: 25px;" type="text"/> per | No <input type="checkbox"/> Yes <input type="checkbox"/> |

|   |  |
|---|--|
| <b>2</b> Person's name  | Age  |
| <input style="width: 95%; height: 25px;" type="text"/>        | <input style="width: 40%; height: 25px;" type="text"/>   |
| Date they move in   | Relationship to you                                      |
| <input style="width: 80%; height: 25px;" type="text"/>        | <input style="width: 95%; height: 25px;" type="text"/>   |
| <b>Their share of the rent/lodgings</b>                       | <b>Do they own the home?</b>                             |
| \$ <input style="width: 60%; height: 25px;" type="text"/> per | No <input type="checkbox"/> Yes <input type="checkbox"/> |

|   |  |
|---|--|
| <b>3</b> Person's name  | Age  |
| <input style="width: 95%; height: 25px;" type="text"/>        | <input style="width: 40%; height: 25px;" type="text"/>   |
| Date they move in   | Relationship to you                                      |
| <input style="width: 80%; height: 25px;" type="text"/>        | <input style="width: 95%; height: 25px;" type="text"/>   |
| <b>Their share of the rent/lodgings</b>                       | <b>Do they own the home?</b>                             |
| \$ <input style="width: 60%; height: 25px;" type="text"/> per | No <input type="checkbox"/> Yes <input type="checkbox"/> |

|   |  |
|---|--|
| <b>4</b> Person's name  | Age  |
| <input style="width: 95%; height: 25px;" type="text"/>        | <input style="width: 40%; height: 25px;" type="text"/>   |
| Date they move in   | Relationship to you                                      |
| <input style="width: 80%; height: 25px;" type="text"/>        | <input style="width: 95%; height: 25px;" type="text"/>   |
| <b>Their share of the rent/lodgings</b>                       | <b>Do they own the home?</b>                             |
| \$ <input style="width: 60%; height: 25px;" type="text"/> per | No <input type="checkbox"/> Yes <input type="checkbox"/> |

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



74 Do you (and your partner) share your accommodation with one or more of your children who receive a Centrelink payment, ABSTUDY or a service pension but they do **not** receive Rent Assistance?

No

Yes

**Paying for accommodation**

75 Do you (and your partner) pay board and/or lodgings?

Board means you (and your partner) are provided with some regular meals.

Lodgings means the amount you (and your partner) pay for your accommodation.

No  **Go to 77**

Yes  **Go to next question**

76 Can you separate the amounts you (and your partner) pay for board and/or lodgings?

No  Total board and lodgings charged per day, week, fortnight, 4 weeks or calendar month

\$ \_\_\_\_\_ per

**Go to 78**

Yes  Amount paid for board (meals) per day, week, fortnight, 4 weeks or calendar month

\$ \_\_\_\_\_ per

Amount paid for lodgings (accommodation only) per day, week, fortnight, 4 weeks or calendar month

\$ \_\_\_\_\_ per

**Go to 78**

77 What is the amount **you** (and **your partner**) pay per day, week, fortnight, 4 weeks or calendar month, for example, rent, maintenance or site fees?

This would be the total you (and your partner) pay for the property minus any subsidy/rebate, rent amount claimed as a business expense for taxation purposes **or** contribution from another person or organisation.

\$ \_\_\_\_\_ per

78 On what date did you (and your partner) start paying these fees?

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

79 What type of accommodation do you (and your partner) live in?

Boarding house/hostel/private hotel, hospital or disability housing  **Go to 81**

Private house or townhouse/unit/flat

Community housing

Defence housing

Caravan/cabin/mobile home

Boat

Other  **Give details below**

*Go to next question*

\_\_\_\_\_

**Go to next question**

80 What is the **total amount** being charged per day, week, fortnight, 4 weeks or calendar month?

\$ \_\_\_\_\_ per

81 Details of your landlord, authorised agent or person you (and/or your partner) pay rent to

Full name

\_\_\_\_\_

Address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Postcode

Contact phone number

\_\_\_\_\_

82 Do you (and/or your partner) have a formal lease or tenancy agreement?

No  **Go to next question**

Yes   Provide a full copy of your signed lease or tenancy agreement.

## Other income

83 Are you (and/or your partner) permanently blind?

No

 You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ **Go to 94**

Yes

 You will need to complete and return the **Request for Ophthalmologist/Optometrist Report (SA013)** form for each person claiming Age Pension for people who are permanently blind. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)


84 Indicate who is permanently blind

### Tick one only

Both (you and your partner)  ▶ **Go to 86**

You  • If you do **not** have a partner, **Go to 86**  
• If you do have a partner, **Go to 85**

Your partner

 You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ **Go to 94**

85 Is your partner claiming or receiving a Centrelink payment?

No  ▶ **Go to next question**

Yes

 You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ **Go to 94**

86 Are you (and/or your partner) claiming Rent Assistance?

No  ▶ **Go to next question**


Yes

 You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
▶ **Go to 94**

87 Are you (and/or your partner) receiving any payment from the New Zealand government?

No  ▶ **Go to next question**

Yes

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

88 Are you (and/or your partner) receiving any payment from the Department of Veterans' Affairs?

No  ▶ **Go to 90**

Yes  ▶ **Go to next question**

89 Which payment do you (and/or your partner) receive from the Department of Veterans' Affairs?

### Tick all that apply

Disability Pension (War Pension)

Income Support Supplement


Service Pension

War Widow's Pension

War Widower's Pension

Other


Not sure

 Provide a copy of a letter or other document which gives the reference number and details of each payment.

90 Do you (and/or your partner) receive a New Enterprise Incentive Scheme (NEIS) Allowance?

No  ▶ **Go to next question**

Yes

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

## Compensation

91 Read this before answering the following question.

### Compensation, insurance and damages include:

- workers' compensation
- motor vehicle
- criminal injuries/victims compensation
- sporting injury
- public liability
- medical negligence
- personal accident and sickness insurance
- income replacement insurance.

Have you (or your partner) ever:

- received
- claimed, or
- been able to claim

compensation, insurance and/or damages?

No  ▶ **Go to 93**

Yes  ▶ **Go to next question**

92 Have you (or your partner) told us about this before?

No

 You will need to complete and return a **Compensation and damages (Mod C)** form.  
If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

Yes  Go to next question

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

No  Go to next question

Yes

 Provide a copy of the policy document and the latest statement for this policy.

### Checklist

94 Which of the following forms and/or documents are you (and/or your partner) providing with this form?

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

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

Identity documents   
Each person claiming Age Pension may be required to provide identity documents. (Refer to 'Confirming your identity' in the **Information Booklet**)

Proof of date of birth   
(if required at **question 7**)

**Authorising a person or organisation to enquire or act on your behalf (SS313)** form   
(if you answered Yes at **question 17**)

Proof of Australian residence status   
(if you answered No at **question 20**)

**Relationship details – Separated under one roof (SS293)** form   
(for **both you** and **your ex-partner**, if you answered No at **question 20**)

**Relationship details – Separated under one roof (SS293)** form   
(for **only you**, if you answered Yes at **question 20**)

Copies of documents to verify the details of the sale of your former home   
(for example, settlement statement) (if you answered Yes at **question 49**)

Continued

Copy of documents showing the details of the entry agreement for daily fees   
(if you answered No at **question 59**)

Copy of the signed accommodation agreement(s)   
(if you answered Yes at **question 60**)

Copy of the signed contract or agreement   
(if you answered Yes at **question 64**)

Signed lease or tenancy agreement   
(if you answered Yes at **question 82**)

**Income and Assets (SA369)** form   
(if you answered No at **question 83**)

**Request for Ophthalmologist/Optomtrist Report (SA013)** form   
(if you answered Yes at **question 83**)

**Income and Assets (SA369)** form   
(if you answered Your partner at **question 84**)

**Income and Assets (SA369)** form   
(if you answered Yes at **question 85** or **86**)

Copy of a letter or document which gives the reference number and details of each New Zealand payment   
(if you answered Yes at **question 87**)

Copy of a letter or document which gives details of Department of Veterans' Affairs payment(s) and reference number(s)   
(if required for **question 89**)

Copy of a letter or document which gives the reference number and details of the NEIS Allowance   
(if you answered Yes at **question 90**)

**Compensation and damages (Mod C)** form   
(if you answered Yes at **question 92**)

Copy of the policy document and the latest statement for this policy   
(if you answered Yes at **question 93**)

## Privacy notice

### 95 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)

### 96 Declaration

#### I/We declare that:

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

#### I/We understand that:

- I/we must return **all** supporting documents at the same time as I/we lodge my/our claim form. If I/we do not return all documents, my/our claim may not be accepted. The only exception will be if I/we are waiting for medical evidence or other documents from a third party.
- I/we must notify Centrelink of any changes to this information **within 14 days** of the change(s) occurring.
- Centrelink can make relevant enquiries to make sure I/we receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature



Date

/ /

Your partner's signature



Date

/ /

## Returning this form

Return this form and any supporting documents:

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

### 97 Read this before answering the following question.

The following question asks whether you (and/or your partner) wish to claim the Pension Bonus.

To be paid a Pension Bonus you must be a registered member of the Pension Bonus Scheme. The scheme is closed to new registrations. You must claim the Pension Bonus at the same time you claim Age Pension. When claiming your Pension Bonus timing is important. If you have any questions or concerns, call us on **132 300** and ask to talk to a Financial Information Service Officer.

For more information, go to

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

Are you (and/or your partner) a registered member of the Pension Bonus Scheme?

- No  You (and/or your partner) are not eligible for a Pension Bonus. If you (and/or your partner) have answered all questions relating to the Claim for Age Pension you (and/or your partner) have completed the form.

Yes  *Go to next question*

### 98 Are you (and/or your partner) a registered member with the Department of Veterans' Affairs?

No  *Go to next question*

Yes  Give details below

#### You

What is your Pension Bonus file number, with the Department of Veterans' Affairs?

#### Your partner

What is your Pension Bonus file number, with the Department of Veterans' Affairs?

► *Go to next question*

## Pension Bonus

**STOP** Complete the following questions only if you (and/or your partner) are already registered in the Pension Bonus Scheme and now wish to claim. Do not answer these questions if you (and/or your partner) are only claiming Age Pension.

### You

- 1 Have you previously claimed or received a Pension Bonus from the Department of Veterans' Affairs or Centrelink?

No  Go to next question

Yes  Date paid or date rejected

- 2 Has your relationship status changed since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

| 1 Relationship status            | Date from                        |
|----------------------------------|----------------------------------|
| <input type="text"/>             | <input type="text" value="/ /"/> |
| Partner's name (when applicable) |                                  |
| <input type="text"/>             |                                  |

| 2 Relationship status            | Date from                        |
|----------------------------------|----------------------------------|
| <input type="text"/>             | <input type="text" value="/ /"/> |
| Partner's name (when applicable) |                                  |
| <input type="text"/>             |                                  |

- 3 **Read** this before answering the following questions about the work test.

The **work test** for the Pension Bonus Scheme requires you to complete at least 960 hours of gainful work each year. This is an average of 20 hours per week for 48 weeks each year. At least 640 of these hours must have been worked in Australia. For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](http://servicessaustralia.gov.au/pensionbonusscheme)

- 4 When did you cease meeting the work test?

- 5 Are you claiming a bonus on the basis of your work?

No

Yes

- 6 Are you claiming a bonus on the basis of your partner's work?

No

Yes

Not applicable (no partner)

### Your partner

- 1 Have you previously claimed or received a Pension Bonus from the Department of Veterans' Affairs, or Centrelink?

No  Go to next question

Yes  Date paid or date rejected

- 2 Has your relationship status changed since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

| 1 Relationship status            | Date from                        |
|----------------------------------|----------------------------------|
| <input type="text"/>             | <input type="text" value="/ /"/> |
| Partner's name (when applicable) |                                  |
| <input type="text"/>             |                                  |

| 2 Relationship status            | Date from                        |
|----------------------------------|----------------------------------|
| <input type="text"/>             | <input type="text" value="/ /"/> |
| Partner's name (when applicable) |                                  |
| <input type="text"/>             |                                  |

- 3 **Read** this before answering the following questions about the work test.

The **work test** for the Pension Bonus Scheme requires you to complete at least 960 hours of gainful work each year. This is an average of 20 hours per week for 48 weeks each year. At least 640 of these hours must have been worked in Australia. For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](http://servicessaustralia.gov.au/pensionbonusscheme)

- 4 When did you cease meeting the work test?

- 5 Are you claiming a bonus on the basis of your work?

No

Yes

- 6 Are you claiming a bonus on the basis of your partner's work?

No

Yes

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

If you (and/or your partner) are providing work records you will need to provide evidence such as payment summaries (group certificates), income tax returns, time sheets or the completed work record(s). You can get a copy of the *Work record for the Pension Bonus Scheme* by going to

**[servicesaustralia.gov.au/customer/enablers/centrelink/pension-bonus-scheme/the-work-test](http://servicesaustralia.gov.au/customer/enablers/centrelink/pension-bonus-scheme/the-work-test)**

7 Provide details about the work you have done to meet the work test.

|  |           |
|--|-----------|
| <b>1</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>2</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>3</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>4</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>5</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

8 Since your Pension Bonus Scheme registration date have you claimed or received a Carer Payment from us or a Carer Service Pension from the Department of Veterans' Affairs?

No  Go to next question

Yes  Date from      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

7 Provide details about the work you have done to meet the work test.

|  |           |
|--|-----------|
| <b>1</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>2</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>3</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>4</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

|  |           |
|--|-----------|
| <b>5</b> Worked from                             | Worked to |
| / /  | / /       |
| Evidentiary certificate <input type="checkbox"/> |           |
| or   |           |
| Work record <input type="checkbox"/>             |           |

8 Since your Pension Bonus Scheme registration date have you claimed or received a Carer Payment from us or a Carer Service Pension from the Department of Veterans' Affairs?

No  Go to next question

Yes  Date from      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

**You**

- 9** Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 10** Since your Pension Bonus Scheme registration date have you been imprisoned?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 11** Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 12** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 13** Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 14** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (for example, Cyclone Larry, the Queensland floods or Victorian bushfires)?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

**Your partner**

- 9** Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 10** Since your Pension Bonus Scheme registration date have you been imprisoned?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 11** Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 12** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 13** Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

- 14** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (for example, Cyclone Larry, the Queensland floods or Victorian bushfires)?

No  Go to next question

Yes  Date from                      Date to

|     |     |
|-----|-----|
| / / | / / |
|-----|-----|

**You**

- 15** Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (for example, family, recreation, sick, long service, carer)?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from

Date to

 /  / 
 /  / 
**2** Type of leave

Date from

Date to

 /  / 
 /  / 

- 16** In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away any money or other assets, or sold assets for less than their market value?

No  Go to next question

Yes  Give details below

**1** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$
**2** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$
**3** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$

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

**Your partner**

- 15** Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (for example, family, recreation, sick, long service, carer)?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from

Date to

 /  / 
 /  / 
**2** Type of leave

Date from

Date to

 /  / 
 /  / 

- 16** In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away any money or other assets, or sold assets for less than their market value?

No  Go to next question

Yes  Give details below

**1** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$
**2** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$
**3** What did you give away or sell?

Date of gift/sale

 /  / 

What was it worth?

How much did you get for it?

 \$

 \$

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



## You

- 17** You need to provide all documents that provide details about the work you have done to meet the work test (for example, payment summaries, income tax returns, time sheets, completed work records or evidentiary certificates).

### Privacy notice

#### 18 You need to read this

##### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We 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](https://servicesaustralia.gov.au/privacy)

#### 19 Declaration

##### I declare that:

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

##### I understand that:

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

Your signature



Date

/ /

## Your partner

- 17** You need to provide all documents that provide details about the work you have done to meet the work test (for example, payment summaries, income tax returns, time sheets, completed work records or evidentiary certificates).

### Privacy notice

#### 18 You need to read this

##### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We 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](https://servicesaustralia.gov.au/privacy)

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- Centrelink can make relevant enquiries to make sure I receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature



Date

/ /

### Returning this form

Return this form and any supporting documents:

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