



ADFSF17
07/16

Early access to superannuation benefit on compassionate grounds

Benefit application form & information

Before you start

Before completing this benefit application form, you are advised to read our **ADF Super Product Disclosure Statement (PDS)**, available from adfsuper.gov.au or by calling us on **1300 203 439**.

This application is to be used by members of ADF Super who are seeking early access to their benefit on compassionate grounds.

The Department of Human Services (DHS) assesses compassionate claims on behalf of the Australian Government.

You can apply for the early release of superannuation on one or more of these specified compassionate grounds if you need to:

- > pay for medical or dental treatment, for yourself or a dependant or pay for transport to the treatment
- > prevent your home from being sold by the lender that holds the mortgage
- > modify your home or vehicle to accommodate your own needs, or the needs of a dependant, for a severe disability
- > pay for palliative care for yourself or a dependant with a terminal medical condition
- > pay for expenses associated with a dependant's death, funeral or burial.

All enquiries regarding applications for early release on these grounds should be directed to DHS on **1300 131 060**. An application form is also available from their website at humanservices.gov.au

If you have already received DHS approval for the release of your benefit, please complete **Sections A, B, C, E and F** of this application.

You will need to supply the original or a certified copy of your DHS approval letter with your application.

An Exit fee of \$50 is charged at the time of processing for each full or part withdraw from ADF Super, including transfers to another superannuation fund.

Your privacy is important to us

Protecting your privacy is important to CSC. CSC collects personal information for the purposes of providing superannuation products and information to members, including the administration of superannuation legislation and rules, and for any other directly relatable purposes.

Your personal information will be disclosed to Superannuation Administration Corporation, trading as Pillar Administration (Pillar) ABN 80 976 223 967, AFSL 245591 for the purposes of establishing, administering and releasing your account. CSC may also disclose your personal information to the extent that it is required or permitted to do so by law.

A full copy of our privacy policy is available at adfsuper.gov.au. Alternatively, you may request a full copy of our privacy policy by telephoning us on **1300 203 439**.

Your ADF Super in Action

Any financial product advice in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation or needs. You may wish to consult a licensed financial advisor. You should obtain a copy of the **ADF Super Product Disclosure Statement (PDS)** and consider its contents before making any decision regarding your super.

Commonwealth Superannuation Corporation (CSC) ABN: 48 882 817 243 AFSL: 238069 RSEL: L0001397
Trustee of the Australian Defence Force Superannuation Scheme (ADF Super) ABN: 90 302 247 344 RSE: R1077063

Completing the application

Following are some notes to assist you in completing each section of the benefit application.

Section A – About yourself

Please complete all boxes in this section.

The postal address you show is where all correspondence will be sent.

A contact phone number or email address is also required in case we need to contact you regarding your application. This will help avoid delays in payment.

Your Tax File Number (TFN)

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct PAYG tax at the Top Marginal Rate plus the Medicare levy from benefits if a person does not provide a TFN.

If you have not been issued a TFN you should lodge an application form with the Australian Taxation Office. Forms are available at all ATO offices. You must provide proof of identity at the time you lodge the form.

Section B – Application for early access to your superannuation benefit on compassionate grounds

Please complete all boxes and enclose the original or certified copy of the DHS letter with your application.

Section C – Payment arrangements

This section is where you nominate the account where you want your benefit to be paid.

Please ensure that the information here is correct, as delayed payment may result if it is not.

Section A – About yourself

Service Navy Army RAAF

ADF Super membership number /Service number

Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

Previous name (if changed name)

GIVEN NAME(S)

SURNAME

Date of birth

D D / M M / Y Y Y Y

Postal address

SUBURB STATE POSTCODE

Contact details

MOBILE NUMBER

BUSINESS HOURS

AFTER HOURS

Email

WORK

@

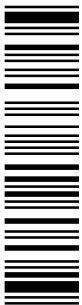
HOME

@

Tax File Number

I have already provided my TFN to ADF Super. You can check this by logging into **ADF Super Member Online** or under the 'Your details' section of your Member Statement.

ADF Super is authorised to collect and validate your Tax File Number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. To improve the electronic transfer of funds between superannuation providers, ADF Super is required to validate your TFN with the Australian Taxation Office (ATO). In the event that your TFN cannot be validated, or you do not wish to provide your TFN, you will be required to provide identification in accordance with **Section D**.



Section D – Identification requirements

To protect your benefit against fraud, money laundering and terrorism financing, under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, you must complete a '100 point check' and attach the following certified documents:

Primary documents (70 points)

Provide **ONE** of the following documents:

- > Birth certificate
- > Birth Card issued by the NSW Registry of Births, Deaths and Marriages
- > Australian Citizenship certificate

OR ONE of the following international travel documents:

- > a current passport
- > an expired passport which has not been cancelled and was current within the preceding two years
- > another document of identity having the same characteristics as a passport (eg this may include some diplomatic documents and some documents issued to refugees).

Note: You do not accumulate additional points for more than one document from this category.

Secondary documents (40 points)

Provide **ONE** of the following documents containing your photograph and/or signature:

- > an Australian driver's license or another licence or permit issued under a law of the Commonwealth, a State or Territory
- > an identification card issued to a public employee
- > an identification card issued by the Commonwealth, a State or Territory as evidence of your entitlement to a financial benefit
- > a student ID issued by a tertiary education institution.

Note: Additional documents from this category can be awarded 25 points.

Tertiary documents (25 points)

Provide an identification document, eg marriage certificate (for maiden name only), credit card, council rates notice, telephone account, foreign driver's licence, Medicare card, etc.

Note: More than one document may be counted, but points from a particular source may be counted only once, eg if a MasterCard and Visa card are issued from the same financial institution, only one may be counted.

Certifying your documents

The following people can certify your documents:

- > a legal practitioner enrolled on the roll of a supreme court or the high court of Australia
- > a judge or magistrate of a court
- > a chief executive officer of a Commonwealth court
- > a registrar or deputy registrar of a court
- > a Justice of the Peace (JP)
- > a notary public
- > a police officer
- > an Australian consular officer or an Australian diplomatic officer
- > an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- > a finance company officer with five or more years of continuous service
- > a member of the Institute of Chartered Accountants in Australia (ICAA), Certified Practising Accountants (CPA Australia) or the Institute of Public Accountants (IPA).

For a full list of certifying authorities, visit the Legislation website at legislation.gov.au

The certifying authority must confirm in writing that you are the valid holder of the identification that you are presenting and that any copies are true copies of the original.

Important

The certification must include the signature, name, address, occupation, telephone number and registration number (if applicable) of the certifying authority.

Section E – Declare and sign this form

I declare that:

- > the information I have provided on this form is true and correct
- > I have read the **ADF Super Product Disclosure Statement (PDS)**, and this application is made subject to the terms and conditions of that information
- > I have provided certified proof of identity documents (if applicable) to prove my identity
- > I have provided an original or certified copy of the original DHS release letter
- > I am aware that a \$50 Exit Fee will be charged for this withdrawal.

SIGNATURE

Date signed

D	D	/	M	M	/	Y	Y	Y	Y
<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section F – Member checklist

I have:

- read all the explanatory notes
- filled in all sections applicable to you
- checked your bank account details at **Section C**
- signed the declaration at **Section E**
- attached a original or certified copy of your DHS release letter

Section G – Lodgement

Please send this form with your certified proof of identity documents (if applicable) to:

ADF Super
Locked Bag 9400
WOLLONGONG DC
NSW 2500

Emailed or faxed copies will not be accepted.

..... END FORM

 **EMAIL**
members@adfsuper.gov.au

 **WEB**
adfsuper.gov.au

 **PHONE**
1300 203 439

 **OVERSEAS CALLERS**
+61 2 4298 6031

 **POST**
ADF Super
Locked Bag 9400
WOLLONGONG DC
NSW 2500

 **FAX**
1300 204 314