

Benefit claim upon death of a spouse



What do I use this form for?

Complete this form if you need to claim a benefit following your spouse's death. Please complete in dark blue or black ink.

PLEASE NOTE:

- ☰ QSuper will advise you if a pension entitlement is payable. Before a benefit is paid, QSuper may seek additional information to confirm to whom the benefit is payable.
- ☰ Death payments made to dependants are exempt from tax.

PART A PERSONAL DETAILS

Deceased's details: Mr Mrs Miss Ms Dr

Surname:

Given names:

Spouse details: Mr Mrs Miss Ms Dr

Surname:

Given names:

Postal address:

State: Postcode:

Residential address: Same as above Different (please provide below)

State: Postcode:

Previous name¹:

Date of birth: / / (dd/mm/yyyy)

Phone number (home):

(work):

(mobile):

Email address:

Date employment ended: / / (dd/mm/yyyy)

¹ If your name has changed since you last had contact with QSuper, please contact us for information on the additional documents you will need to provide.

PART B ENTITLEMENT DECISION (TICK ONLY ONE OPTION)

Lump sum (for full entitlement)

Pension (for full entitlement)

Combination (lump sum/pension as specified)

% lump sum or state amount \$

% pension

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PLEASE NOTE:

Deposits can only be made to your personal bank or credit union account. They cannot be made to a business or loan account.

Neither QSuper nor your financial institution can accept responsibility for any delay or loss of interest caused by incorrect details on this form.

PART C DOCUMENTS

Certified true copies of the following documents are required to enable payment of entitlement. (Please tick if enclosed.)

- Death certificate (full copy)
- Birth certificate (short extract or copy)
- Marriage certificate (full copy)
- Children's birth certificate (full copy—if applicable)

PART D BANK OR CREDIT UNION ACCOUNT DETAILS

Pay into my personal bank or credit union.

To ensure the security of your benefits, we require a copy of your bank or credit union statement that shows your full name, address, and your account details. **We cannot process your request without this.**

Name of bank or credit union:

Account name:

Account number:

Branch name:

Address:

Branch (BSB) number: (available from your bank or credit union)

PLEASE NOTE:

The QSuper Board is committed to complying with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. In line with QSuper's anti-money laundering and counter-terrorism program, we require identification details with any claim you initiate on your QSuper account or as part of a claim as a beneficiary of a QSuper member's account. If you are acting on behalf of a QSuper member (e.g. under a power of attorney), both you and the QSuper member must supply identification as described in this section of the form. A certified copy of the power of attorney is also required.

PART E IDENTIFICATION REQUIREMENTS

For your claim to be paid, you must provide a **certified copy** of one of the following current documents, which contains your name, photograph, and either date of birth or residential address.

Please indicate which document you have attached:

- a driver's licence
- an Australian passport (or one which has expired within the last two years)
- a Proof of Age Card issued under an Australian State or Territory
- a foreign passport or similar travel document containing both a photograph and your signature (any documents written in a foreign language must be accompanied by an English translation prepared by an accredited translator).

If you are unable to provide any of the above documents, please contact the QSuper Contact Centre on 1300 360 750 for information on other documents you may provide to verify your identity.

See page 3 for certification procedures and a list of approved certifiers.

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PART F DECLARATION

- I declare I [am the person named on this form, or have a power of attorney to act on the member's behalf]¹.
- I request payment to be made in the manner indicated on this form.
- I declare the information given on this form is true and correct.
- I declare I am the widowed spouse of the deceased member, and we were married at the date my spouse ceased Queensland Government employment, and at the time of their death.
- I authorise QSuper to release details of my TFN to the Australian Taxation Office (if applicable).
- I have supplied the necessary documentation as outlined in Part C of this form.
- I have attached a completed *Tax file number declaration* form if I am under age 60 and choosing the pension option.
- I have supplied the necessary documentation to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, as outlined in Part E of this form.

¹ Cross out whichever is not applicable.

(Signature)

X

SIGN HERE

(Date – dd/mm/yyyy)

/ /

CERTIFICATION PROCEDURE

- Take the original and a copy of your selected documents to an acceptable certifier (see list to the right) who will verify that the original documents have been sighted.
- Ensure that the certifier sights the original and signs the copy, confirming it is a true copy of the original. The certifier must also include their name, the date of certification, and their certifying designation from the list of acceptable certifiers.
- Post this form and the certified copy of your identification to QSuper. We cannot accept facsimiles or copies of the certified documents. Please do not send us your original documents.

WHO TO SEE

CONDITIONS AND DEFINITIONS

Australia Post	An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public; or a permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public.
Banking and other financial institutions	An officer with two or more continuous years of service with one or more financial institutions or a finance company officer with two or more continuous years of service with one or more financial companies.
Justice of the peace or notary public	An individual appointed by the courts whose duties include certifying documents.
Legal professionals/ law enforcement	A person who is enrolled on the roll of the Supreme Court of a State or Territory, or High Court of Australia, as a legal practitioner. Other professionals include a judge of a court, a magistrate, a chief executive officer of a Commonwealth court, a registrar or a deputy registrar of a court, or a police officer.
Accountants	A member of the Institute of Chartered Accountants in Australia, CPA Australia, or the National Institute of Accountants, with two or more years of continuous membership.
Consular or Diplomatic Officer	An Australian Consular Officer or an Australian Diplomatic Officer.

Contacting QSuper

Contact Centres

70 Eagle Street Brisbane

63 George Street Brisbane

1300 360 750 (+617 3239 1004 if overseas)

Monday to Thursday 8.30am to 5.00pm

Friday 9.00am to 5.00pm

GPO Box 200 Brisbane Qld 4001
Fax 07 3239 1121

qsuper.qld.gov.au

ABN: 60 905 115 063
SFN: 2610 419 41

The privacy of your personal information is important to us. We are collecting this information to administer your superannuation account. If you would like further information about our privacy policy, you can download QSuper's *Your privacy* fact sheet from our website. Alternatively, call us and we will send you a copy.