

Reversionary Life Pension Surviving Partner Application Checklist



This checklist provides some examples of the official documents and evidence recommended to support an application for a surviving partner benefit. It is intended to be a general guide only and some applications may require further information from the applicant.

This document is to assist surviving partner applications for reversionary life pensions only. Information relevant to defined benefit scheme members can be found in the 'Who will receive my RBF Death Benefit?' factsheet on the RBF website.

If an RBF pensioner dies, the surviving partner should contact us by calling the RBF Enquiry Line on **1800 622 631**. We will explain the process to you and send you a letter which will contain the application form and some further information.

Most of the documents that you will need to provide must be certified. To do this, you need both a photocopy and the original document. The photocopy is then compared to the original document and if the documents are identical the photocopy will then be certified as being a true copy of the original document. For further information on certifying documents, please refer to the 'Completing Proof of Identity' fact sheet on the RBF website.

Please note we are only able to accept official Government issued documents, we cannot accept commemorative birth or marriage certificates or extracts as these are not official documents.

Surviving Partner Definition

Under RBF regulations, a surviving partner is a person who **the Commission is satisfied** that at the time of the pensioner's death, was either married or in a significant relationship with the deceased, and:

- (a) was living with the member on a genuine domestic basis and receiving significant financial support from the member; or
- (b) does not meet the definition in (a) but was living with the member on a genuine domestic basis; or
- (c) does not meet the definition in (a) and (b), but for a medical reason or because of the care needed to be provided to the person, would have been living with the member; or
- (d) does not meet the definition in (a), (b) or (c) but was receiving significant financial support from the member.

Please note: If the above criteria cannot be met and a Decision is made that you are not the surviving partner then a surviving partner pension cannot be paid to you.

Significant relationships

A surviving partner may include a person that the pensioner was in a significant relationship with within the meaning of the *Relationships Act 2003*.

If the significant relationship is registered, please provide a **certified** copy of the proof of registration.

If the significant relationship is not registered, in determining whether two persons are in a significant relationship, all the circumstances of the relationship are taken into account.

Step 1 – Complete the application form

Complete the 'Application to be determined as a surviving partner' form, including the Statutory Declaration.

This form is available on the RBF website and must be signed by the applicant and witnessed and **certified** correctly.

The applicant must include their occupation in the Statutory Declaration. It is acceptable to include 'Pensioner' or 'Retired' here.

Step 2 – Supply evidence of death

Evidence of Death can be provided to us through the following documents:

A **certified** copy for the deceased of either:

- ▶ Record of Death; or
- ▶ Extract of Record of Death; or
- ▶ Medical Certificate of Cause of Death.



The original Record of Death and certified copies of the Record of Death can be obtained from the Funeral Home.

A Record of Death certificate can also be requested (at a cost) from Births, Deaths and Marriages in all states and territories of Australia (and equivalent overseas organisations).

Step 3 – Supply proof of identity

Supply us with a **certified** copy of the deceased's proof of identity. A number of official documents can be used for this purpose, such as:

- ▶ Current Australian (or foreign) Drivers Licence; or
- ▶ Government Issued Working with Vulnerable People Card; or
- ▶ Current Passport or Passport that has expired within the last two years; or
- ▶ Australian Birth Certificate (not an Extract or commemorative certificate) issued by Births, Deaths and Marriages



The member's proof of identity documents can be prepared in advance and certified at the time of application.

Step 4 – Establishing your identity

Supply us with your **certified** proof of identity documents. If your Legal Personal Representative is completing the form on your behalf, **both** your and their **certified** proof of identity documents must be supplied.

Any one of the following primary identification documents are acceptable:

- ▶ Current Passport or Passport that has expired within the last two years; or
- ▶ Current Australian (or foreign) Drivers Licence; or
- ▶ Personal Information Card or other Photo ID issued by Service Tasmania.

If you do not have any of the above primary documents please refer to the Completing Proof of Identity factsheet for details of alternative identification.



You can prepare your proof of identity documents in advance and have them certified at the time of application.

Step 5 – Evidence of your relationship

If you were married at the time of the members death, please supply RBF with a copy of the Certificate of Marriage. You do not need to have this document certified.

Alternatively, if you were not married at the time of death, please provide evidence to support that you were in a significant relationship at the time.

Please refer to the section 'Significant Relationships' on page 1 for more detail.

Were you living in the same residence as the deceased at the *time of death*?

If yes, please supply **certified** documentary evidence showing the residential address and names of both yourself and the deceased, this doesn't necessarily have to show joint names. Separate **certified** copies of different documents (one in the deceased's name and another in your name) is acceptable. For example, the deceased's drivers licence and your bank statement but they must show the same residential address.

Documentary evidence may include (but is not limited to) the following:

- ▶ Drivers licence; and/or
- ▶ Motor vehicle registration; and/or
- ▶ Council rates notice (issued within the last 3 months); and/or
- ▶ Bank statements; and/or
- ▶ ATO Notice of Assessment.

We need to be satisfied that you were living together at the time of death and recommend that you provide as many forms of documentary evidence as possible to support your claim. This will hopefully avoid any delays and the need to contact you for further information.

Were you living in a separate residence to the deceased at the *time of death*?

If yes, please provide details in Section C, question 4 of the application form.

If the pensioner died in a nursing home, we require written confirmation from the surviving partner or legal representative that, were it not for the need for professional care, the pensioner and surviving partner would have been living together at the time of death.



It may also assist the claim to provide a copy of the most recent invoice from the nursing home the member was residing in if the above case applies.

Step 6 – Evidence of financial support

Were you receiving financial support from the deceased at the time of death?

If yes, please supply certified evidence of the pensioner providing financial support to you.

Examples of documentary evidence are as follows:

- ▶ Copies of bank statements relating to joint loans or bank accounts,
- ▶ Documentation in relation to the joint ownership of real estate, such as Certificate of Title or Mortgage papers;
- ▶ Land Tax Valuation notice,
- ▶ Copies of any Utilities bills (such as home telephone, water, electricity) issued in your joint names (preferably issued within the last 3 months).

We need to be satisfied that you were receiving financial support from the deceased at the time of death and recommend you provide as many forms of documentary evidence as possible to support your claim. This will hopefully avoid any delays and the need to contact you for further information.

Step 7 – Getting it ready

We understand that gathering all of the required evidence can be overwhelming. To assist you, we have summarised the documents and evidence required and whether the documents need to be certified.

You can also refer to the ‘Completing Proof of Identity’ factsheet available on the RBF website which details acceptable identification documents.

It may be a good idea to prepare as much as you can in advance and then keep it until such time as they are required. If you collate your original documents and copies in a folder, you can have them all certified at the same time.

Remember that we are also available to assist you in person at our offices and the RBF Enquiry Line on **1800 622 631**.

Documentary evidence	Can this be prepared in advance?	Does it need to be certified?
Step 1 A completed ‘Application to be determined as a surviving partner’ form	No	Yes
Step 2 Evidence of Death	No	Yes
Step 3 Evidence of Deceased’s Proof of Identity	Yes	Yes
Step 4 Your Proof of Identity Documents	Yes	Yes
Step 5 Certificate of Marriage (if applicable)	Yes	No (Yes for change of name)
Registration of a Significant Relationship (if applicable)	Yes	Yes
Evidence that you were living together. Provide as many documents as you can to support your application.	No, evidence must be dated from 3 months before death until date of death. You can work out in advance which documents you will use and make a note.	Yes
Step 6 Evidence of you receiving financial support Provide as many documents as you can to support your application.	No, evidence must be dated from 3 months before death until date of death. You can work out in advance which documents you will use and make a note.	Yes



We can certify your documents if you visit our offices in Hobart and Launceston.

Step 8 – Return completed forms to us

This can be done by any of the following methods:

1. Attending an RBF Office; or
2. Using the Reply Paid envelope supplied; or
3. Posting the documents to:
RBF, Reply Paid 89418,
PARRAMATTA NSW 2124

Documents cannot be emailed to us as the original certified documents are required.

However, any enquiries can be sent by email to us at rbf.enquiries@treasury.tas.gov.au

Please note: If sufficient evidence has not been provided to support the application, this will create delays in determining if you are the surviving partner and establishing a pension for you. We may ask for other forms of evidence to confirm if you are eligible for a benefit. This may include statutory declarations in cases where there is not sufficient evidence to confirm eligibility.

© April 2022 The Superannuation Commission as trustee for the Retirement Benefits Fund.

The information in this fact sheet is of a general nature only. It does not take into account your personal objectives, financial situation or needs. Accordingly, before acting on the contents of this fact sheet, you should consider whether it is appropriate to you, having regard to your objectives, financial situation and needs. You should read any relevant RBF documentation available at www.rbf.com.au before making a decision. We also recommend that you consider talking to a financial adviser.

The Superannuation Commission is not licensed to provide financial advice to RBF members.

If you would like general information about your super you can make an appointment with one of RBF's Superannuation Consultants; simply contact the RBF Enquiry Line on **1800 622 631**.

At RBF, we strive to provide accurate and up-to-date information to our members. However, things may have changed since this fact sheet was published and some of the information may no longer be correct. If there are mistakes or omissions in the information, we reserve the right to correct those errors or omissions. The governing rules of RBF will prevail over any misstatement in this fact sheet.

Information contained in this fact sheet may be updated at any time without prior notification to you. Updated information can be downloaded from our website at www.rbf.com.au. A hard copy can also be posted free of charge by calling the RBF Enquiry Line on **1800 622 631**.

The privacy and confidentiality of your personal information is important to RBF. We hold your personal information securely and use it only for the purposes described in the RBF 'Privacy Policy', available on the RBF website at www.rbf.com.au.

Your personal information, including sensitive information, may be transferred between RBF and RBF's administrator Australian Administrative Services Pty Ltd (ABN 62 003 429 114). AASs Privacy Policy is also available on the RBF website at www.rbf.com.au.

Issued by the Superannuation Commission (ABN 96 573 090 182) as trustee of the Retirement Benefits Fund (ABN 51 737 334 954)

What happens next?

We will review the information provided with the application and use this to form a decision. Once this decision has been made an outcome letter will be sent to you as the applicant.

The outcome letter will detail if any further information is required before the pension can be paid. Sometimes bank account and Tax File Number details are missing and if this is the case, we will ask for these details to be supplied in this letter.

This letter will also provide information about the opportunity to convert all or part of the pension to a lump sum payment. This option can only be exercised within 3 months of the date of our decision that you are the surviving partner.

If the outcome letter advises that we have determined that you do not meet the definition of a surviving partner and you disagree with this decision, you will need to advise us of this in writing within 21 days of receiving the outcome letter. You will then be provided with the opportunity to present additional information in support of your claim.

Where do I go for further assistance?

Importantly, if you have any questions or concerns throughout this process please contact the RBF Enquiry Line on **1800 622 631** between 9am and 5pm Monday to Friday.

Our offices in Hobart and Launceston are available to assist you and can also supply you with paper copies of forms and factsheets if you do not have access to a printer at home.

You can also book an appointment for a face to face interview with a superannuation consultant in Hobart, Launceston, Burnie and Devonport.

Contacting RBF

Contact RBF if you would like additional information or assistance.

RBF Enquiry Line: 1800 622 631 or
+61 2 8571 6868 (international)

Visit: www.rbf.com.au

Write: RBF, Reply Paid 89418,
PARRAMATTA NSW 2124

Email: rbf.enquiries@treasury.tas.gov.au

Office: Ground Floor,
21 Kirksway Place,
Hobart

Level 3, Henty House,
1 Civic Square,
Launceston