

# Pensions

## Reversionary Life Pension

### Partner declaration form



#### About this form

Please complete this form if you have a Reversionary RBF Life Pension and you wish to make a Partner Declaration. This declaration is considered by the Superannuation Commission (Commission), to determine if your declared partner will be eligible to receive a Provisional Surviving Partner Pension (if you die) on the basis that they are reasonably likely to meet the definition of a surviving partner under RBF's governing rules (included below).

The information you and your partner provide in this form will assist the Commission in making the Provisional Surviving Partner determination. You are responsible for keeping your partner declaration up to date.

The declaration of a partner **does not guarantee** that they will be formally determined as the surviving partner in the future.

If this declaration is accepted, a Provisional Surviving Partner Pension may be paid for a period up to 6 months while the formal determination of a surviving partner is being made in accordance with RBF's governing rules. If the declared partner is formally determined as the Surviving Partner, then a surviving partner pension is payable.

Where a person is paid a provisional surviving partner pension but is then not determined formally as the Surviving Partner, any pension monies already paid will need to be refunded to the Commission. Please ensure that all parts of this form have been completed. Please print in black or blue pen, in UPPERCASE, one character per box.

Once this form has been completed and you have supplied current documentary evidence of your relationship and of any financial support provided, alongside Certified proof of identity for you both, please either return the declaration to the RBF Office in Hobart or Launceston or post to:

Retirement Benefits Fund  
Reply Paid 89418  
PARRAMATTA NSW 2124

#### Surviving Partner Definition

Surviving partner means the spouse of an RBF member (and includes a person with whom the member was in a significant relationship within the meaning of the Relationships Act 2003), and who was, in the opinion of the Commission, at the time of the RBF member's death:

- (a) living with the member on a genuine domestic basis and is receiving significant financial support from the member; or
- (b) does not meet the definition in (a) but is 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 is receiving significant financial support from the member.

For the purposes of the *Relationships Act 2003*, a significant relationship is between two adults who:

- ▶ have a relationship as a couple; and
- ▶ are not married to one another or related by family.

If you need assistance with this form, please call the RBF Enquiry Line on **1800 622 631**.

**Part 1 – Pensioner to complete**

**1. Your details**

Pension number(s)

Title

Date of birth (dd/mm/yyyy)

 /  / 

Marital status

Given name(s)

Surname

Residential address

Suburb

State

Postcode

Postal address (if different to Residential)

Suburb

State

Postcode

Occupation

**Contact details**

Email

Mobile

 – 

I understand that

- if I have chosen to nominate an alternative contact person, they are authorised by me to be contacted by RBF (if RBF are unable to contact me or my partner).

Signature of pensioner (this declaration must be signed even if you have not provided an alternative contact person in Part 1 section 2.)



Date

 /  / 

**2. Alternative authorised contact (optional)**

This section only needs to be completed if you want RBF to be able to contact someone else in order to locate you if we cannot contact you or your declared partner. This is OPTIONAL and you do not have to complete this section if you do not wish to.

Relationship

Title

Given name(s)

Surname

**Part 1 – Pensioner to complete cont.**

Residential address

Suburb

State

Postcode

Postal address (if different to Residential)

Suburb

State

Postcode

**Preferred contact method and details**

Email

Mobile

**3. Pensioner Declaration (this must be completed, signed and witnessed correctly)**

I (full name)

of (residential address)

Occupation: Retired

do solemnly and sincerely declare that:

I am married  OR I am in a significant relationship

My partner's name is:

My partner as declared currently satisfies the definition of a surviving partner (as outlined on page 1) on the basis that they:  
(please briefly describe your situation)

  
  
  

I make this solemn declaration under the *Oaths Act 2001*.

Declared at

on

Date

Signature

Before me

*Full name and signature of the person before whom the declaration is made*

*Qualification and address of Justice, Commissioner for Declarations or authorised person*

## Part 2 – Partner to complete

### 1. Partner details

Title	Date of birth (dd/mm/yyyy)	Marital status	
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>	<input type="text"/>
Given name(s)			
<input type="text"/>			
Surname			
<input type="text"/>			
Residential address			
<input type="text"/>			
Suburb		State	Postcode
<input type="text"/>		<input type="text"/>	<input type="text"/>
Postal address (if different to Residential)			
<input type="text"/>			
Suburb		State	Postcode
<input type="text"/>		<input type="text"/>	<input type="text"/>
Occupation			
<input type="text"/>			

### Contact details

Email
<input type="text"/>
Mobile
<input type="text"/> - <input type="text"/>
Tax File Number
<input type="text"/> - <input type="text"/> - <input type="text"/>

### 2. Partner bank account details

If you are determined as the Provisional Surviving Partner, at the time of the death of the Reversionary Pensioner, we will deposit pension payments via Electronic Funds Transfer (EFT) direct to your account.

Name of Financial Institution			
<input type="text"/>			
Branch name			
<input type="text"/>			
BSB	Account number		
<input type="text"/>	<input type="text"/>		
Account name			
<input type="text"/>			

**Note:** the account nominated above must be in your name and must be an account for which you can sign to withdraw, either solely, or either to sign but not both to sign.

**Part 2 – Partner to complete cont.**

**NOTE:** Tax will be applied to any pension payments based on the full tax rate applicable (assuming no tax free threshold), however if you provide a TFN (tax file number) declaration with your relevant information as at the time of death of the Reversionary Pensioner, the tax applicable may change for future payments.

I understand that:

- ▶ it is the responsibility of my partner to update RBF with any change to the details contained in the partner declaration; and
- ▶ if I receive any provisional surviving partner pension, but am not determined by the Commission to formally be the surviving partner, I will need to refund any pensions paid to the Commission.

Signature

Date

X

/ /

**3. Partner Declaration**

I (full name)

of (residential address)

Occupation

do solemnly and sincerely declare that:

I am married  OR I am in a significant relationship

My partner's name is:

I declare that I currently satisfy the definition of a surviving partner (as outlined on page 1) on the basis that I:  
(please briefly describe your situation)

I make this solemn declaration under the *Oaths Act 2001*.

Declared at on

Date

Signature

/ /

X

Before me

Full name and signature of the person before whom the declaration is made

Qualification and address of Justice, Commissioner for Declarations or authorised person

### Part 3 – Supporting documentary evidence of your relationship and/or financial support

Please list below the documents that are being provided with this form as supporting evidence.

If you and your declared partner **both** hold a current drivers licence or Tasmanian Government personal information card **and** reside at the same address, then this will satisfy both Part 3 and Part 4 and you will not need to supply anything further for this declaration. Both copies will need to be certified as these are also being used for Part 4.

If one or both of you do not have a current drivers licence or Tasmanian Government personal information card but you are living in the same residence, evidence should be provided which shows the residential address and names of both parties. This can be a document in joint names, or it can be separate copies of different documents (one in the pensioner's name and another in the declared partner's name) which shows the same residential address for both. For example, the pensioner's drivers' licence and the declared partner bank statement but they must show the same residential address and be current or issued within the last 3 months.

Examples of the types of documentary evidence that can be used (only one is required at this stage):

- ▶ Tax Office Notice of Assessment issued in the **last 12 months**
- ▶ **Current** Motor vehicle registration
- ▶ Bank Statements issued in the **last 3 months**
- ▶ **Current** Drivers licence for both the pensioner and declared partner showing the same address
- ▶ Rates notice from local council issued in the **last 3 months**
- ▶ Electricity, gas or water bill issued in the **last 3 months**
- ▶ Insurance renewal notice covering the **current** date
- ▶ Landline phone bill issued in the **last 3 months** (mobile phone bills will not be accepted)

Document type	Date of document
	/ /
	/ /
	/ /
	/ /

For the purpose of this declaration, documentary evidence of your relationship and/or financial support are not required to be certified. However, you are both required to provide certified proof of identity. Please see Part 4.

### Part 4 – Certified proof of identity

Certified proof of identity is required from both the pensioner and their partner as declared in this form. Please refer to the 'Completing proof of identity factsheet' for information on who is authorised to certify documents.

#### Primary photographic identification

You will need to provide a copy of one of the following primary identification documents if you can:

- ▶ Current Australian or foreign driver's licence that contains a photograph of the person in whose name the document is issued (including the back of the driver's licence if your address has changed)
- ▶ A passport issued by the Commonwealth of Australia
- ▶ A passport or similar document issued for the purpose of international travel that:
  - ▶ contains a photograph AND either the signature of the person in whose name the document is issued or any unique identifier of the person in whose name the document is issued;
  - ▶ is issued by a foreign government, the United Nations or an agency of the United Nations; AND
  - ▶ if it is written in a language that is not understood by the person carrying out the verification - is accompanied by an English translation prepared by an accredited translator<sup>1</sup>
- ▶ A card issued under a law of a State or Territory for the purpose of proving the person's age which contains a photograph of the person in whose name the document is issued;
- ▶ A national identity card issued for the purpose of identification that:
  - ▶ contains a photograph AND either the signature of the person in whose name the document is issued or any unique identifier of the person in whose name the document is issued;
  - ▶ is issued by a foreign government, the United Nations or any agency of the United Nations; AND
  - ▶ in a language that is not understood by the person carrying out the verification - is accompanied by an English translation prepared by an accredited translator<sup>1</sup>

Identification documents must not have expired at the time we receive them (excepting an Australian passport which may be expired for a maximum of 2 years).

#### 1 Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

### Alternative identification

If you are unable to provide any primary photographic identification, you will need to provide two identification documents, one from each of the following lists:

#### LIST 1 - Primary non-photographic identification documents

- ▶ A birth certificate or birth extract issued by a State or Territory<sup>2</sup>
- ▶ A citizenship certificate issued by the Commonwealth of Australia
- ▶ A citizenship certificate issued by a foreign government that, if it is written in a language that is not understood by the person carrying out the verification - is accompanied by an English translation prepared by an accredited translator
- ▶ A birth certificate issued by a foreign government, the United Nations or an agency of the United Nations that, if it is written in a language that is not understood by the person carrying out the verification - is accompanied by an English translation prepared by an accredited translator<sup>2</sup>;
- ▶ Concession card, as defined from time to time in the Social Security Act 1991.

#### LIST 2 - Secondary identification documents

- ▶ Letter from the Department of Human Services (Centrelink) or other Commonwealth or State or Territory body in the last 12 months regarding a Government assistance payment which contains your name and your residential address
- ▶ Tax Office Notice of Assessment issued in the last 12 months which contains your name and residential address and records a debt payable to or by you or to the Commonwealth under a Commonwealth law relating to taxation
- ▶ Rates notice from local council issued in the last 3 months which contains your name and residential address and which records the provision of services by that local government body
- ▶ Electricity, gas or water bill issued in the last 3 months which contains your name and residential address and which records the provision of services by that service provider
- ▶ Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted) which contains your name and residential address and which records the provision of services by that service provider.

### Your privacy

The fund is administered by us along with our service provider, Australian Administration Services Pty Ltd (AAS). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact the RBF Enquiry Line on **1800 622 631**.

Our Privacy Policies are available to view at [www.rbf.com.au](http://www.rbf.com.au) or you can obtain a copy by contacting the RBF Enquiry Line on **1800 622 631**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact the RBF Enquiry Line on **1800 622 631** or write to our Privacy Officer, Reply Paid 89418, PARRAMATTA NSW 2124.

## 2 Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

## Part 5 – Complete the checklist

To enable your declaration to be accepted, please ensure you have correctly completed this form before returning it to RBF.

Please ✓ when complete.

- Have you completed Part 1 and signed in both locations? The declaration must be witnessed by an authorised person (most RBF staff can witness this).
- Has your declared partner completed Part 2 and signed in both locations? The declaration must be witnessed by an authorised person (most RBF staff can witness this).
- Has your declared partner included their bank account details?
- Have you included supporting current documentary evidence of your relationship in Part 3?
- Have you included certified proof of identity for both yourself (pensioner) and the person declared as your partner? Documents can be certified by our staff in RBF Offices. A current driver's licence or personal identification card is preferred.