

Pensions

Reversionary Life Pension Provisional surviving partner pension declaration form



About this form

Please complete this form if you have a Reversionary RBF Life Pension and you wish to make a Provisional Surviving Partner Pension Declaration. This declaration is considered by the Superannuation Commission (Commission), in the event of your death.

Please ensure that both Parts 1 and 2 have been completed. Please print in **black** or **blue** pen, in UPPERCASE, one character per box.

Please ✓ when complete.

- Part 1 has been completed and the declaration signed by the pensioner
- Part 2 has been completed and the declaration signed by the person declared as your partner
- Part 3 has been completed and the supporting documentary evidence included
- Part 4 has been included for both the pensioner and the person declared as your partner (certified proof of identity).

The Commission will seek to determine, at the time of your death, whether your partner is eligible to receive a Provisional Surviving Partner Pension on the basis that they are reasonably likely to meet the definition of a surviving partner. The surviving partner definition is explained in the section below.

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 formally determined as the Surviving Partner, then the pension will continue to be paid until they die.

The information you and your partner provide in this form will assist the Commission in making these determinations. As the reversionary pensioner, 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 the Commission is not satisfied that, at the time of your death, the person declared as your partner in this form does not meet the surviving partner criteria, then a pension will not be payable. Where a person is paid a provisional surviving partner pension, but is then not determined formally as the Surviving Partner, then any pension monies already paid will need to be refunded to the Commission.

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

Title

Date of birth (dd/mm/yyyy)

Given name(s)

Surname

Residential address

Suburb

State

Postcode

Postal address (if different to Residential)

Suburb

State

Postcode

Occupation

Contact details

Email

Mobile

2. Alternative authorised contact

Please complete this section if you wish to authorise RBF to contact a third party in the event that we are unable to contact you or your partner.

Relationship

Title

Given name(s)

Surname

Residential address

Suburb

State

Postcode

Postal address (if different to Residential)

Suburb

State

Postcode

Part 1 – Pensioner to complete cont.

Preferred contact method and details

Email


Mobile

 -

I understand that

- ▶ the person named in Section 2 above, is authorised by me to be contacted by RBF; and
- ▶ it is my responsibility to ensure that my partner declaration is kept up to date with RBF.

Signature



Date

 / /

3. Pensioner Declaration

I (full name)

of (residential address)

Occupation: Retired

do solemnly and sincerely declare that:

I am in a significant relationship within the meaning of the *Relationships Act 2003* with

My partner as declared, is:

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

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

Declared at

on

Date

 / /

Signature



Before me

(Justice, Commissioner for Declarations or authorised person)

Part 2 – Partner to complete

1. Partner details

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

Given name(s)

Surname

Residential address

Suburb State Postcode

Postal address (if different to Residential)

Suburb State Postcode

Occupation

Contact details

Email

Mobile

Tax File Number

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

Branch name

BSB Account number

Account name

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 with another person.

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 in a significant relationship within the meaning of the *Relationships Act 2003* with

and I am currently:

(a) living with my partner on a genuine domestic basis and am receiving significant financial support from me; or

(b) I do not meet the definition in (a) but I am living with my partner on a genuine domestic basis; or

(c) I do not meet the definition in (a) and (b), but for a medical reason or because of the care needed, I would have been living with my partner; or

(d) I do not meet the definition in (a), (b) or (c) but I am receiving significant financial support from my partner.

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

Declared at

on

Date

/ /

Signature

X

Before me

(Justice, Commissioner for Declarations or authorised person)

Part 3 – Supporting Documentary Evidence

Please list below the documents that are being provided with this form as supporting evidence (these do not need to be certified at this stage):

Document type	Dated
	/ /
	/ /
	/ /
	/ /

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 acceptable identification.

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 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.