



To:	Fax:
Name of Super Scheme:	Phone:

From:	Fax:
Location:	Phone:

Date:	Pages:
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REQUEST FOR INFORMATION
Notice under Section 128 of the *Veterans' Entitlements Act 1986*
Defined Benefit Income Stream Schedule
for Veterans' Affairs Assessment Purposes

DVA Reference Number:

Regarding:

Address:

Date of Birth:

Product Name:

Product Reference:

This Department is currently reviewing the pension entitlements of who is in receipt of a defined benefit income stream.

As a person to whom the Secretary of this Department has delegated his powers under s.128 of the VEA, I require you to complete the attached 'Defined Benefit Income Stream Schedule' with respect to whose details are supplied above.

Once you have completed the completed the schedule, kindly fax it to my attention on .

I require you to provide the completed schedule to me within 14 days of your receipt of this notice.

Should you have any enquiries regarding this matter, please contact me directly on .

Yours sincerely

Delegate of the Secretary



Defined Benefit Income Stream Schedule for Veterans' Affairs Assessment Purposes

Privacy notice

Your personal information is protected by law, including the *Privacy Act 1988*. Your personal information may be collected by the Department of Veterans' Affairs (DVA) for the delivery of government programs for war veterans, members of the Australian Defence Force, members of the Australian Federal Police and their dependants.

[Read more: How DVA manages personal information](#)

Details of client

1. Name	<input type="text"/>
2. DVA Reference	<input type="text"/>
3. Date of Birth	<input type="text"/>
4. Address	<input type="text"/>

Please ensure client details above match your records (amend if different)


Details of product

5. Super Reference Number	<input type="text"/>
6. Name of Super Fund	<input type="text"/>
7. Commencement Date <i>(if payee is Eligible Spouse, enter original superannuant's start date)</i>	<input type="text"/> / <input type="text"/> / <input type="text"/>
8. Current Gross Fortnightly amount of payment	\$ <input type="text"/> . <input type="text"/> p/f Effective from <input type="text"/> / <input type="text"/> / <input type="text"/>
9. Current Gross Fortnightly amount of payment in respect of children	\$ <input type="text"/> . <input type="text"/> p/f Effective from <input type="text"/> / <input type="text"/> / <input type="text"/>

Details of Tax Free Component (known as Deductible Amount for Veterans' Affairs assessment purposes as defined under VEA s.5J(1))

10. Does the superannuant have a Tax Free Component?	No <input type="checkbox"/> ► Go to Question 13 Yes <input type="checkbox"/>
11. Is the Tax Free Component calculated using the NEW proportional method under: <ul style="list-style-type: none"> subdivision 307-C of the <i>Income Tax Assessment Act 1997</i> for pensions commencing on or after 1 July 2007; or subsection 307-125(6) of the <i>Income Tax (Transitional Provisions) Act 1997</i> due to the occurrence of a trigger event for pensions commencing prior to 1 July 2007? 	No <input type="checkbox"/> Yes <input type="checkbox"/> ► Current amount of Tax Free Component per fortnight \$ <input type="text"/> . <input type="text"/> p/f DVA staff - record the Tax Free Component as a Deductible Amount per fortnight unless the saving provision applies.
12. Is the Tax Free Component calculated using the OLD method based on UPP for pensions which commenced prior to 1 July 2007 as defined in subsection 307-125(2) of the <i>Income Tax (Transitional Provisions) Act 1997</i> ?	No <input type="checkbox"/> Yes <input type="checkbox"/> ► Undeducted Purchase Price (Total UPP at Commencement Date) \$ <input type="text"/> . <input type="text"/> Current amount of Tax Free Component per fortnight \$ <input type="text"/> . <input type="text"/> p/f DVA staff - record the Total UPP and relevant number to derive the Deductible Amount per fortnight.

Signature

13. Name	<input type="text"/>
14. Phone number	[<input type="text"/>] <input type="text"/>
15. Signature	 <input type="text"/> Date <input type="text"/> / <input type="text"/> / <input type="text"/>