

# **Application for a Pension Bonus Bereavement Payment**

You should complete this form if your deceased partner had registered for the Pension Bonus Scheme but had not claimed a Pension Bonus and you wish to apply for a Pension Bonus Bereavement Payment from the Department of Veterans' Affairs.

#### **Important information**

To qualify for Pension Bonus Bereavement Payment, your partner must have died on or after 1 January 2008 and have been a registered member of the Pension Bonus Scheme, who had not claimed the pension and bonus before they died. The amount of Pension Bonus Bereavement Payment you get will depend on your circumstances and your and your partner's combined income and assets, immediately before they died.

#### Filling in this form

Complete the application as at the date of your partner's death. All references to "your partner" means "your deceased partner".

Please write in BLOCK letters using a **blue** or **black** pen (not pencil).

Please **tick** the appropriate boxes.

Where you see a box like this Go to question 4 skip to the question number shown. You do not need to answer the questions in between.

If you do not have all the forms you need or require additional forms, contact your nearest DVA or VAN office.

## What else you will need to provide

You will need to provide documents to **prove your identity** to DVA. There is a list of acceptable documents on page 3.

This form will also tell you which other documents you need to provide to support your claim. If you are providing copies of documents, they must be **certified copies** (see 'Who can certify copies of documents' on page 4).

#### **Lodging your claim**

You can lodge your application by mail. If you send in original documents, they will be photocopied and the originals returned to you by registered post.

You can lodge your application by visiting your nearest DVA or VAN office. These are listed on page 2 of this form.

**Please note:** This application should be lodged within 26 weeks of the death of your partner.

#### **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

#### Giving false or misleading information is a serious offence.

If any of the details you give in this form change, you are required under section 54 of the *Veterans' Entitlements Act 1986*, to notify the Department within 14 days. There are penalties for failure to notify the Department.

### **How to contact DVA**

For information, please call the Department of Veterans' Affairs (from anywhere in Australia) on:

1800 555 254

State	Address	GPO Box 9998 Brisbane QLD 4001	
New South Wales	Centennial Plaza Tower B 280 Elizabeth Street Sydney NSW		
Victoria	300 La Trobe Street Melbourne VIC	GPO Box 9998 Brisbane QLD 4001	
Queensland	480 Queen Street Brisbane QLD	GPO Box 9998 Brisbane QLD 4001	
South Australia	Westpac House 91 King William Street Adelaide SA	GPO Box 9998 Brisbane QLD 4001	
Western Australia	AMP Building 140 St Georges Terrace Perth WA	GPO Box 9998 Brisbane QLD 4001	
Tasmania	Barack Place 254 - 286 Liverpool Street Hobart TAS	GPO Box 9998 Brisbane QLD 4001	
Northern Territory	Winnellie Central 14 Winnellie Road Winnellie NT	GPO Box 9998 Brisbane QLD 4001	
Australian Capital Territory	6 Bowes Street Woden ACT	GPO Box 9998 Brisbane QLD 4001	

#### Proving your identity to DVA

When you lodge a claim with DVA, you must show documents from the Category A and B lists below which prove your identity. If you are already receiving a pension or allowance from DVA you will need to provide a Category B document from the list below to prove your identity.

If you must produce documents, you must show original documents or true and certified copies of these documents. (See 'Who can certify copies of documents' on page 4.) If you mail your claim and originals of your proof of identity documents, your documents will be returned by registered post.

From the lists of Category A and B documents on this page, you must provide **3 different documents** with 1 document from Category A and two documents from category B. If none of the documents you produce to satisfy Category A or B provides evidence of your current residential address, then you must also produce a document from Category C:

A B B OR A B B C

If any of the documents are in a previous name, you must provide an additional document which shows how your name was changed (e.g. a marriage certificate).

#### Category A documents

Documents from Category A provide proof of birth or arrival in Australia.

- Australian passport (current) not to be used concurrently as a Category B document
- Full Australian birth certificate
- Record of Immigration Status
- Foreign passport and current Australian Visa
- Travel document and current Australian Visa
- Certificate of Evidence of residential status
- Citizenship Certificate

#### **Category B documents**

Documents from Category B provide evidence of your identity existing in the community.

- Australian driver's licence (current and original)
- Australian passport (current) not to be used concurrently as a Category A document
- · Australian Defence Force (ADF) identification card
- Firearms licence (current and original)
- Current overseas passport with valid entry stamp or visa
- Medicare card
- Change of name certificate (for marriage or legal name change showing link with previous name(s)
- · Credit or bank account card
- DVA card
- Security Guard/Crowd Control licence
- Australian marriage certificate issued by a government department
- Tertiary identification card

#### **Category C documents**

Documents from Category C provide evidence of residential address or residence in a Nursing Home or Residential Care Facility.

- Utilities notice
- · Rent details
- Document from Nursing Home or Residential Facility that provides evidence of residence

### If you don't have the right documents

Other documents may be acceptable. Contact your nearest DVA or VAN office.

#### Who can certify copies of documents?

When you lodge a claim with DVA, you must provide documents as proof of identity. In response to some questions on the forms, you will also have to provide documents (such as financial documents).

If you provide **original** documents, your documents will be sighted and verified by a DVA officer and returned to you by registered post.

If you provide copies of your documents, they must be **certified copies** (certified as true by a Justice of the Peace or other person as listed below). The person certifying the copies must see the original documents.

Note: DVA employees with 5 years continuous service can certify your documents as true copies and will do so without charge.

#### Persons who can certify copies include:

- Justice of the Peace
- Commissioner for Declarations
- permanent employee of:
  - the Commonwealth or of a Commonwealth authority, or
  - a State or Territory or of a State or Territory authority, or
  - a local government authority
  - with 5 or more continuous years of service
- member of the Australian Defence Force who is:
  - an officer; or
  - a non-commissioned officer within the meaning of the *Defence Force Discipline Act* 1982 with 5 or more years of continuous service; or
  - a warrant officer within the meaning of that Act.
- permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public
- agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- bank officer with 5 or more continuous years of service
- building society officer with 5 or more years of continuous service
- credit union officer with 5 or more years of continuous service
- finance company officer with 5 or more years of continuous service
- Member of the Association of Taxation and Management Accountant
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Minister of religion registered under Division 1 Part IV of the Marriage Act 1961
- police officer
- chiropractor
- dentist
- legal practitioner
- medical practitioner
- nurse
- pharmacist
- physiotherapist
- · veterinary surgeon
- teacher employed on a full time basis at a school or tertiary education institution.

A full list of who can certify documents can be found at:

http://www.comlaw.gov.au/comlaw/management.nsf/lookupindexpagesbvid/IP200400084?OpenDocument

#### If you ask someone to certify copies of your documents, you must make sure that:

- · the person certifying is on the above list
- they use the wording "CERTIFIED TRUE COPY"
- they sign and date the copy
- they print their name and profession or qualification
- they print their business hours address
- they print their business hours contact telephone

	SECTION A	Your and your deceased partner's details			
	Your details				
1	Sex	Male Female			
2	Title	Mr Mrs Miss Ms Other			
3	Surname				
4	Given name(s)				
5	Date of birth				
6	Residential address	POSTCODE			
7	<b>Postal address</b> (if same as residential,				
	write "AS ABOVE")	POSTCODE			
8	Telephone numbers	Home Work  [ ]			
	Your deceased partner's details				
9	Surname				
10	Given name(s)				
11	Date of birth	/ /			
12	Date of death	Please attach a copy of the death certificate or a letter from the Funeral Director to confirm the date of death.			

13	Did your partner register for the Pension Bonus Scheme?	No <b>You are not eligible for the bereavement payment -</b> there is no need for you to complete this form.			
		Yes ☐▶ Please indicate where your partner registered for the Scheme.			
		DVA			
		Centrelink  If registered with Centrelink, please provide			
		DVA and Centrelink a copy of the letter confirming registration	۱.		
		What was their Pension Bonus file number?			
14	Was your partner paid a	No			
	pension bonus or Defence Force Income Support Allowance (DFISA) Bonus from either DVA or Centrelink?	Yes You are not eligible for the bereavement payment - there is no need for you to complete this form.			
15	Did your partner receive an	No			
	income support payment from either DVA or Centrelink since registering for the Pension Bonus Scheme?	Yes You are not eligible for the bereavement payment -if your partner has received a disqualifying payment. Contact DVA before completing this form.			
	Your residency details				
16	Are you:	An Australian citizen			
		A refugee or a former refugee			
		The holder of a permanent visa Please attach a copy of document			
		The holder of a special purpose visa  The holder of a special category visa  The holder of a spe			
17	Are you living permanently in Australia?	No			
	"Permanently" means you normally live in Australia on a long-term basis. Holidays or short trips outside Australia would not affect this.	Yes			
18	Did you move to, or return to live in Australia in the last 12 months?	No Yes			

	Your deceased partner's reside	ncy details
19	Was your partner:	An Australian citizen
		A refugee or a former refugee
		The holder of a permanent visa Please attach a copy of documents
		The holder of a special purpose visa that show your partner was legally allowed to remain in Australia (e.g.
		The holder of a special category visa passport showing their visa).
20	Was your partner living permanently in Australia?	No _
	"Permanently" means you normally live in Australia on a long-term basis. Holidays or short trips outside Australia would not affect this.	Yes
21	return to live in Australia in the last 12 months?	No Yes
	Relationship status	
22	Did your partner's relationship status change during his/her period of membership of the pension bonus scheme?	No ☐▶ Please go to next question  Yes ☐▶ Please give details below
		Relationship status Date from Date to Partner's name (when applicable)
23	, 0	No ☐▶ Please go to next question
	home as your partner at the time of their death?	Yes   ▶ Please go to question <b>26</b>
24	Why were you not living with	Partner's illness
	your partner?	Your illness
		Partner in gaol
		Partner's employment
		Other Please give details below
25	Period not living with your partner	From / / To / /

	Dependent children				
26	Did you and/or your partner have any dependent children under 16 years of age?  This means that you were	No			
	legally responsible for the day-to-day care, welfare and development of a child who was in your care or wholly or substantially in your care.	1 Child's full name  Date of birth / / Male Female   Is the child at school? Yes No ▶ Gross fortnightly income \$			
		2 Child's full name  Date of birth // Male Female   Is the child at school? Yes No ▶ Gross fortnightly income \$			
		Please attach a certified copy of the birth certificate/extract for each child.			
27	Did you and/or your partner have any dependent children aged 16-22 years of age who were in full-time education?	No			
27	have any dependent children aged 16-22 years of age who	Yes ☐▶ Please give details below  1 Child's full name			
27	have any dependent children aged 16-22 years of age who	Yes ☐▶ Please give details below  1 Child's full name			
27	have any dependent children aged 16-22 years of age who	Yes Please give details below  1 Child's full name  Date of birth / / Male Female  Does the child receive No Yes Type of payment any government			
27	have any dependent children aged 16-22 years of age who	Yes Please give details below  1 Child's full name  Date of birth / / Male Female  Does the child receive No Yes Type of payment any government payments?  Amount of payment \$			
27	have any dependent children aged 16-22 years of age who	Yes Please give details below  1 Child's full name Date of birth // Male Female  Does the child receive No Yes Type of payment any government payments?  Amount of payment \$  Other gross fortnightly income \$  2 Child's full name			

SECTION B	Accommodation details	
Which of the following best describes where you and your partner lived?	In a home you and/or your partner owned, or owned jointly with another person or organisation This includes paying it off (mortgage)	Go to question <b>32</b> on page 10
	In rental accommodation or free accommodation	Go to SECTION <b>C</b> on page 10
	In a relocatable home you and/or your partner owned Such as a home situated in a village or caravan park where you are paying site fees	Go to SECTION <b>C</b> on page 10
	In a retirement village	Go to question <b>29</b> below
	In a residential aged care home (nursing home or hostel) which provided nursing care	● Go to SECTION <b>C</b> on page 10
	In accommodation which you and/or your partner have the right to use free for life Such as a granny flat	Go to question <b>31</b> below
	In a home owned by a private trust or a private company	Go to question <b>35</b> on page 10
	<b>Other</b> (e.g. this could be where you and/or your partner did n Please give details	ot have a fixed address)
On what date did you and/or your partner move into the retirement village?	/ /	
Did you and/or your partner pay an entry contribution?	No	
	\$ Please attac	h documents such as t to verify the amount.
Did you and/or your partner pay a sum of money and/or transfer assets to another person in return for this accommodation for life?	No Please go to SECTION C  Yes Please give details below  Date paid/transferred / /  Amount paid \$  OR  What assets were transferred  Market value of	
	Which of the following best describes where you and your partner lived?  On what date did you and/or your partner move into the retirement village?  Did you and/or your partner pay an entry contribution?  Did you and/or your partner pay a sum of money and/or transfer assets to another person in return for this	Which of the following best describes where you and your partner lived?  In a home you and/or your partner owned, or owned jointly with another person or organisation This includes paying it off (mortgage)  In rental accommodation or free accommodation  In a relocatable home you and/or your partner owned. Such as a home situated in a village or caravan park where you are paying site fees  In a retirement village  In a residential aged care home (nursing home or hostel) which provided nursing care  In accommodation which you and/or your partner have the right to use free for life Such as a granny flat  In a home owned by a private trust or a private company  Other (e.g., this could be where you and/or your partner did not please give details)  On what date did you and/or your partner pay an entry contribution?  No Please give details  Please give details  Please go to SECTION C Yes How much was paid?  \$ Please go to SECTION C Yes Please go to SECTION C Yes Please give details below  Date paid/transferred  Amount paid  OR  What assets were

insurance bonds, or friendly society bonds) shares in listed or unlisted

public companies

37	<ul> <li>Did you and/or your partner receive income from:</li> <li>a superannuation pension</li> <li>an income stream such as an allocated pension, market linked pension, immediate annuity.</li> </ul>	No □► Yes □►	Please go to next question  Please attach a schedule from your fund manager for each income stream.
38	Did you and/or your partner receive income from an authority or agency outside Australia?  This includes overseas pensions (e.g. British Retirement Income), benefits, allowances, superannuation, compensation and war related payments.	No □► Yes □►	Please go to next question  Please attach a document from the issuing authority or agency which gives details including the amount in the foreign currency (e.g. latest pension certificate) for each payment.
39	Did you and/or your partner receive any other income that you have not told us about?  This may include gratuities, money from boarders or lodgers and income from an estate.	No □ ► Yes □ ►	Please go to next question Please give details
40	Do you wish to declare a net market value for your and your partner's household contents and personal effects?	No □► Yes □►	\$10,000 will be held as the value What is your estimated value?  \$
41	Did you and/or your partner have any motor vehicles, boats, caravans or trailers?	No □▶ Yes □▶	Please go to next question What is the total value?  \$
42	Did you and/or your partner own or have an interest in any real estate (other than your home) in Australia or overseas?	No □▶ Yes □▶	Please go to next question Please give details for each property on <b>D524</b> <i>Real Estate</i> form
43	Were you and/or your partner involved in a business (including a farm) as a sole trader or partnership?	No ☐► Yes ☐►	Please go to next question  Please complete and attach the <b>D525 Details of Business</b> form or the <b>D526 Farm/Hobby Farm</b> form. A separate form must be used for each business. In these forms you are asked to provide a number of other documents such as a certified copy of your last income tax return.  If you do not have this form or you require additional forms, contact DVA.

44	Were you or your partner involved in a private trust?	No D	Please go to next que	stion				
	You and/or your partner may have been a trustee, an	Yes Please complete and attach the <b>D601</b> <i>Private Trust</i> form. A separate form must be used for each trust.						
	appointor, or a beneficiary. You may have: made a loan to	If you do not have this form or you require additional forms, contact DVA.						
	a private trust, made a gift of cash, assets, or property to a private trust in the last 5 years, relinquished control of		Have you or your parti	ner ever contribut o next question	ed to a Special	Disability Trust?		
	a private trust in the last 5 years, a private annuity, a life interest, an interest in a deceased estate.		<b>Disa</b> eac	ase complete and abilty Trust form. In trust. If you do itional forms, cor	A separate forr not have this for	n must be used for		
45	Were you or your partner involved in a private company?	No □▶	Please go to next que	stion				
	You and/or your partner may have been a director or a shareholder. You may have made a loan to	Yes ☐ ▶	separate form	must be used fo	r each private co	<b>Company</b> form. A ompany. tional forms, contact		
	a private company, transferred shares in a private company in the last 5 years, made a gift of cash, assets or property to a private company in the last 5 years.							
46	Did you and/or your partner have any other assets (in or outside Australia) that you have not already advised us	No Yes	Please go to next que Please give details be					
	of in this form?	Descript	tion of asset		it market value	Amount owing		
	Include things like antiques, other collectibles such as			\$		\$		
	coins, stamps etc.			\$		\$		
				\$		\$		
				\$		\$		
	Disposal of assets							
47	given away, transferred or disposed of any money,		Please go to next que Please give details be					
	property or other assets (including those held in a private company), during the last five years or during the		tion of item you or your gave away or sold	Date	Value of ite			
	period your partner was a			/ /	\$	\$		
	registered member of the Pension Bonus Scheme?			/ /	\$	\$		
				/ /	\$	\$		
					\$	\$		

#### SECTION D

#### **Work test details**

The work test for the Pension Bonus Scheme requires a registered member to complete at least 960 hours of gainful work each year (i.e. an average of 20 hours per week for 48 weeks each year). At least 640 of these hours must be worked in Australia. Only one member of a couple needs to pass the work test, provided that person has registered as a member of the scheme. However, if you both work, you cannot combine your hours to meet the work test (e.g. if you work 12 hours each week and your partner works 10 hours each week, you cannot add the hours together to claim 1144 hours of work in a 12 month period).

48	Please provide information				
	about the work done to meet				
	the work test				

Who worked (self/partner)	Date from	Date to	Documentation attached
	/ /	/ /	Evidentiary certificate* Work record
	/ /	/ /	Evidentiary certificate* Work record
	/ /	/ /	Evidentiary certificate* Work record
	/ /	/ /	Evidentiary certificate* Work record
	/ /	/ /	Evidentiary certificate* Work record

\*An Evidentiary Certificate is a letter issued by either DVA or Centrelink which certifies that you and your partner have met the work test for a period (usually 12 months).



Please attach copies of of any Evidentiary Certificates issued by Centrelink. If you are providing work records, you will need to attach evidence of work such as group certificates, income tax returns and timesheets.

#### Circumstances which affects your bonus

Certain events or circumstances can affect the pension bonus membership of you or your partner.

49 Since registering for the Pension Bonus Scheme, have you or your partner been in receipt of a carer payment from Centrelink?

Vo			Please go to next quest			
V			Diagram	٠	حا: حددا	ا ما

Yes Please give details below

Who (self/partner)	Details	Date from	Date to
		/ /	/ /
		/ /	/ /
		/ /	/ /
		/ /	/ /

50 Since registering for the Pension Bonus Scheme, have you or your partner been a participant in the Community Development Employment Program?

No 🔲 🕨 Please go to next question

Yes Please give details below

Who (self/partner)	Details	Date from	Date to
		/ /	/ /
		/ /	/ /
		/ /	/ /
		/ /	/ /

you or your partner been in gaol?		next question details below		
	Who (self/partner)	Details	Date from	Date to
			/ /	/ /
			/ /	/ /
			/ /	/ /
			/ /	/ /
2 Since registering for the Pension Bonus Scheme, have you or your partner undergone psychiatric confinement due to	No ☐ ▶ Please go to Yes ☐ ▶ Please give	details below		
being charged with committing an offence?	Who (self/partner)	Details	Date from	Date to
an onence:			/ /	//
			/_/	//
			/_/	/ /
			//	//
5 Since registering for the	No    ▶ Please on to	next question		
Since registering for the Pension Bonus Scheme, have you or your partner been unable to work due to the death of a partner?	No	-	Date from	Date to
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a	Yes  ▶ Please give	details below	Date from	
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a	Yes  ▶ Please give	details below		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a	Yes  ▶ Please give	details below		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a	Yes  ▶ Please give	details below		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a	Yes  ▶ Please give	details below		
you or your partner been unable to work due to the death of a partner?  Since registering for the Pension Bonus Scheme, have you or your partner been	Yes  ▶ Please give	Details  Details  next question		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a partner?  4 Since registering for the Pension Bonus Scheme, have you or your partner been absent from work on leave? (This includes paid or unpaid	Yes  Please give  Who (self/partner)  No  Please go to	Details  Details  next question		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a partner?  4 Since registering for the Pension Bonus Scheme, have you or your partner been absent from work on leave? (This includes paid or unpaid leave such as recreation, sick,	Yes  Please give  Who (self/partner)  No  Please go to Yes  Please give	Details  Details  o next question details below		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a partner?  4 Since registering for the Pension Bonus Scheme, have you or your partner been absent from work on leave? (This includes paid or unpaid	Yes  Please give  Who (self/partner)  No  Please go to Yes  Please give	Details  Details  o next question details below		
Pension Bonus Scheme, have you or your partner been unable to work due to the death of a partner?  4 Since registering for the Pension Bonus Scheme, have you or your partner been absent from work on leave?  (This includes paid or unpaid leave such as recreation, sick, bereavement, carer, long	Yes  Please give  Who (self/partner)  No  Please go to Yes  Please give	Details  Details  o next question details below		

#### SECTION E

#### **Payment details**

# 55 Give details of the account you want your payment made to

(If you are already receiving DVA disability pension, do not complete this question.)

Payments must be made to a bank, building society or credit union account held in your name. A joint account is acceptable.

ame of bank, building society or credit union	
/pe of account (e.g. savings, cheque)	
ranch where your account is held	
vench number (DCD)	
ranch number (BSB)	
ccount number (this is not always the number printed on your card)	
ccount held in the name(s) of	

#### SECTION F

#### **Proof of identity**

56 Do you currently receive a regular payment, or hold an entitlement card issued by DVA?

No		
		9

Please attach at least 3 certified copies of documents that prove your identity.

Yes 🔲 🕨



Please attach 1 certified copy of a document from Category B that proves your identity.

Please refer to the Section "Proving your identity to DVA" on page 3 for a list of acceptable documents.

#### SECTION G

#### **Declaration**

I declare that all information on this form is correct and all documents I have provided are genuine.

I understand that:

- there are penalties for giving false or misleading information;
- DVA can make any enquiries necessary to help work out how much I should be paid or whether I am eligible for pension bonus;
- personal information is protected by law and can be disclosed only where permitted by the *Privacy Act 1988* or where I give permission.

YOUR SIGNATURE		
	Date	
	/ ,	/