

Application for Compassionate Grounds

This form can be used to arrange a payment from your AGEST account directly to you by cheque or to your nominated bank account.

Guidelines for completing this form

This form can be used to arrange a payment from your AGEST account if the Department of Human Services (DHS) has approved the early release of your benefit on specified compassionate grounds.

DHS is responsible for assessing all requests for early release of benefits on specified compassionate grounds.

AGEST is responsible for the payment of the benefit from the fund.

The specified grounds for the early release of benefits and the relevant application form are available on DHS's website www.humanservices.gov.au or by calling DHS on 1300 131 060.

DHS will assess your application and write to you with their decision. If DHS approves the early release of your benefit, please send the following documents to AGEST:

1. DHS's letter of approval of the early release of your benefits.
2. This Application for Compassionate Grounds (completed).
3. Proof of your identity as outlined later on this page.

Important notice

Please note the following before you complete this form:

- ▶ AGEST's Product Disclosure Statement (PDS) contains important information regarding your AGEST benefits. You should read the PDS before making an investment decision.
- ▶ AGEST handles your personal information in accordance with a set of National Privacy Principles. AGEST's privacy policy is available in our PDS, on our website or you can call us for a copy.
- ▶ Benefit payments from your account may impact any insurance cover you have in AGEST.
- ▶ The unit prices used to update your account can go up or down depending on movements in investment markets. You can view the latest daily unit prices and our unit pricing fact sheet online at www.agesst.com.au or by contacting us on 1300 724 378.
- ▶ Benefits are usually processed within five days of receiving this form providing it is fully completed, signed and dated and correct identification provided. The payment may take longer if we need to collect further information from you to process your application.

Providing us with your Tax File Number (TFN)

You do not have to provide your TFN but if you don't, there will be a number of implications:

- ▶ AGEST will be prohibited by law from accepting personal after-tax (non-concessional) contributions from you.
- ▶ Any concessional contributions received for you will be taxed at 46.5% (that is, the normal 15% contributions tax + an additional 31.5% penalty tax).
- ▶ It may be more difficult for AGEST to locate and amalgamate your superannuation benefits in the future and to pay your full benefit entitlement.
- ▶ The Australian Taxation Office (ATO) may be unable to pay you a co-contribution.
- ▶ Your superannuation benefit may be taxed at a higher rate than necessary when you withdraw your benefit from the fund.

Further details on providing your TFN are located on AGEST's Product Disclosure Statement (PDS). Your TFN can be provided on the form attached, through our secure online service or by calling us.

Proving your identity

Please note: Proof of identity is not required for requests to pay an amount to the bank account used for your regular pension payments.

For all other payments you must provide proof of your identity. Please note that the proof of identity documents you provide will need to be certified as true copies by an individual approved to do so.

In this section we have included a small list of the most commonly provided proof of identity documents and the most commonly used people who are authorised to certify your proof of identity documents.

If you are unable to satisfy these lists, you can review expanded lists at www.agesst.com.au/id or contact us on 1300 724 378.

Common proof of identity documents

One of the following documents only:

- ▶ Current Driver's licence issued under State or Territory law
- ▶ Passport

OR

One of the following documents:

- ▶ Birth certificate or extract
- ▶ Citizenship certificate issued by the Commonwealth
- ▶ Pension card issued by Centrelink that entitles the person to financial benefits

AND

One of the following documents:

- ▶ Letter from Centrelink regarding a Government assistance payment
- ▶ Notice issued by Commonwealth, State or Territory Government or local council within the past 12 months that contains your name and residential address. For example, an ATO Notice of Assessment or a Rates Notice from your local council

Certifying proof of identity documents

All copied pages of **ORIGINAL** proof of identification documents including any linking documents (see below) need to be certified as true copies by an individual approved to do so. They must:

- ▶ Sight the original and the copy and make sure both documents are identical, then
- ▶ Make sure all pages have been certified as true copies by writing or stamping 'certified true copy', then
- ▶ Sign, print their name, qualification (eg Justice of the Peace, Australia Post employee etc) and date.

Common people used to certify proof of identity documents:

- ▶ Pharmacist
- ▶ Justice of the Peace
- ▶ Notary Public
- ▶ Medical Practitioner or Nurse
- ▶ Police Officer
- ▶ Accountant (CA/CPA)
- ▶ Legal Practitioner
- ▶ Full-time teacher (school or tertiary)
- ▶ Bank/credit union/building society officer (with two years experience)
- ▶ Permanent employee of a Commonwealth, State/Territory or local government (with two years service)

Linking documents

A linking document is a document that proves a relationship between two (or more) names. The table below outlines when a certified copy of a linking document is required.

Purpose:

Change of name

Signed on behalf of applicant

Suitable linking documents:

Certified copy of a Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.

Certified copy of Guardianship papers or Power of Attorney.

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4. Payment details

4a. Instructions for direct payment to member

(please tick)

Please send a cheque to the address on this form **OR**

Please transfer this payment electronically to my bank account as follows:

Bank/Financial institution name

Bank address

Suburb/Town

State/Territory

Postcode

Name(s) in which account is held

BSB number

Account number

Please note that if our electronic payment to the above account is unsuccessful, we will draw a cheque payable to you and send it to the address you noted on this form.

4b. Instructions for a payment to a 3rd party

(please tick)

Please send a cheque to the address below **OR**

Please transfer this payment electronically to the bank account details below:

For cheque payment to a 3rd party:

Contact person name

Name of organisation

Postal address

Suburb/Town

State/Territory

Postcode

For electronic payment to a 3rd party:

Bank/Financial institution name

Bank address

Suburb/Town

State/Territory

Postcode

Name(s) in which account is held

BSB number

Account number

Please note that if our electronic payment to the above account is unsuccessful, we will draw a cheque payable to you and send it to the address you noted on this form.

