Death claim kit

This checklist will help you keep track of the paperwork contained in this kit that you need to complete.

Who needs to complete these forms

A copy of this Death Claim Kit, including the Declaration form, must be given to, and completed by:

- ☐ any legal personal representative of the deceased (see page 2 in this pack for the definition)
- ☐ all known dependants of the deceased (see page 2 in this pack for the definition)

Documents we will need about the deceased member

- ☐ full Death Certificate (including cause of death)
- ☐ certified copy of the deceased's proof of identity, such as a copy of the deceased's passport or driver's licence
- ☐ copy of the deceased's marriage certificate as issued by the Registrar of Births, Deaths and Marriages (if married)
- ☐ certified copy of the deceased's will
- ☐ certified copy of the will stamped by the Court, if Grant of Probate has been issued
- ☐ certified copy of Probate or Letters of Administration, including a copy of the inventory of assets or property of the deceased's estate
- ☐ certified copy of all Orders issued by the Family Court (for example, divorce, decree nisi absolute, all financial and maintenance orders, etc)

What you need to complete: If you are a potential beneficiary or were a dependant

If you wish to be considered by the Trustee in the distribution of the benefit (or if you are requesting that part or all of the benefit be paid to the estate):

- ☐ fully complete Sections A **and** B
- ☐ fully complete Section C **or** E
- ☐ fully complete the statutory declaration
- ☐ provide a certified copy of your proof of identity

If you do not wish to be considered by the Trustee in the distribution of the benefit:

- ☐ fully complete Sections A **and** B
- ☐ fully complete Section D
- ☐ fully complete the statutory declaration

If you are the executor or administrator of the estate

- ☐ fully complete Sections A and B
- ☐ fully complete Section E
- ☐ fully complete the statutory declaration
- ☐ provide a certified copy of one of the executors or administrators listed in the table in Section E.

Depending on the complexity of the estate wishes of the deceased, the number of claimants and other factors, processing this claim may take some time.

Lodge your form	Post to: ElectricSuper PO Box 126 Parramatta NSW 2124
Your privacy	Refer to www.electricsuper.au/privacypolicy for information on how your provided information is used and how we treat your privacy.
Queries	1300 307 844 www.electricsuper.au

Issued by the Electricity Industry Superannuation Board ABN 42 457 486 237 as trustee of the Electricity Industry Superannuation Scheme ABN 57 923 283 236

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

1600.5 11/26 ISS1

Making a death claim: Important information

This information may help you complete the forms and may help you understand why we ask for some of the information we do.

Who needs to complete these documents?

You need to make sure that a copy of the Declaration form is given to any Legal Personal Representative and all known dependants of the deceased (see below for definitions). This could include any spouses, adult children, financial dependants or any people who were interdependent on the deceased at the date of their death.

Who is a 'Legal Personal Representative'?

A legal personal representative is the person who is the executor of the will or is the person who has been granted:

1. probate of the will, or
2. letters of administration of the estate, or
3. another similar grant

whether in Australia or elsewhere.

Who is a 'dependant' under superannuation law?

Under superannuation law, a dependant is:

- the member's spouse (including defacto and same sex) the member's child (of any age, including stepchildren and adopted children),
- someone financially dependent on the member, or
- the member has an interdependency relationship with.

What is an 'interdependency relationship'?

Two people (whether related or not) have an interdependency relationship if:

- they have a close personal relationship, and
- they live together, and
- one or each of them provides the other with financial support, and
- one or each of them provides the other with domestic support and personal care

or

- they have a close personal relationship but do not satisfy the other requirements because either or both of them suffer from a disability or are temporarily living apart.

For example, 2 elderly sisters who live together and are interdependent on each other are in an interdependent relationship.

Friends, flatmates or someone employed to provide domestic support/personal care are not interdependent.

What happens to the member's super account between now and when the benefit is paid?

The member's account will continue to receive investment returns and have fees deducted until the benefit is paid.

Investment returns can sometimes be negative which could cause the account balance to reduce between the date of death and the date of payment.

Why do you need to provide so much information?

The law relating to the payment of death benefits from Australian superannuation plans requires that the Trustee (ElectricSuper) must ensure that all possible beneficiaries are identified. Failure to fully investigate the circumstances of all potential beneficiaries would leave the Trustee open to claims by a legitimate beneficiary who was overlooked or not properly considered.

By not providing all the requested information, your claim could be delayed.

How we may use the information on this form

The information provided on this form and any documents supplied to support the claim will be used by ElectricSuper's Trustee Office only to determine the person or people who should receive payment of the death benefit. Under superannuation legislation, the Trustee may share details of its proposed payment to potential beneficiaries. This means that a person's name and details of their relationship to, or dependence on, the deceased may be disclosed to other claimants.

We may also disclose information to the Trustee's legal advisers and administrators and, if required, to an external dispute resolution body.

Your privacy

The scheme is administered by us along with our service provider, MUFG Retirement Solutions. We collect, use and disclose personal information about you in order to manage, process and make a decision regarding your claim or request for insurance underwriting, and respond to any subsequent correspondence in relation to your request.

Access the policy at www.electricsuper.au/privacypolicy.

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

Declaration in respect of a death benefit payment

electricsuper

Complete the relevant sections in full

Section A	+	**Section B**	+	**Section C** if you wish to be considered to receive some or all of the death benefit **or** **Section D** if you DO NOT wish to be considered for the death benefit **or** **Section E** if you are the executor or administrator and wish some or all of the benefit to be paid to the estate.	+	**Statutory declaration**

A. Details of the deceased member

Member's full name

Member's marital status at the date of their death:

☐ Married ☐ De facto ☐ Separated ☐ Divorced ☐ Single

Member's last residential address:

Suburb/Town | State | Postcode

Member's ElectricSuper member number | Member's tax file number

Did the deceased have a will?

☐ Yes ☐ No ☐ Don't know

If yes, attach a certified copy

Has Probate of the deceased's will, or Letters of Administration for the deceased's Estate been granted or applied for?

Probate

☐ Yes ☐ No ☐ Don't know

If yes, attach a certified copy

Letters of Administration

☐ Yes ☐ No ☐ Don't know

If yes, attach a certified copy

Please provide the full name of each executor of the will or administrator of the estate:

Deceased member's name:

B. Dependency details and estate information

1. Was the deceased survived by a spouse (including de facto) and/or children (including stepchildren, adopted children and adult children)?

☐ Yes ☐ No ☐ Don't know

If yes, please enter the details below. If you need more space, please attach another sheet of paper. If no, please move to the next question.

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: spouse, de facto, child, etc)*

For a child under 18, the name of guardian:

Financially dependent on the deceased? ☐ Yes ☐ No ☐ Don't know

---

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: spouse, de facto, child, etc)*

For a child under 18, the name of guardian:

Financially dependent on the deceased? ☐ Yes ☐ No ☐ Don't know

---

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: spouse, de facto, child, etc)*

For a child under 18, the name of guardian:

Financially dependent on the deceased? ☐ Yes ☐ No ☐ Don't know

Deceased member's name:

2. Is there any other person (other than listed at Question 1) who was financially dependent on or was in an interdependency relationship with the deceased at the time of death?

☐ Yes ☐ No ☐ Don't know

If yes, please enter the details below. If you need more space, please attach another sheet of paper. If no, please move to the next question.

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: sister, parent, etc)*

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: sister, parent, etc)*

3. Was there any other person (other than those listed at Question 1 and 2) who lived with the deceased at the time of death?

☐ Yes ☐ No ☐ Don't know

If yes, please enter the details below. If you need more space, please attach another sheet of paper. If no, please move to the next question.

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: sister, parent, etc)*

Name

Age

Residential address

Suburb/Town

State

Postcode

Phone number

Relationship *(for example: sister, parent, etc)*

Deceased member's name:

B. Dependency details and estate information (continued)

4. What is the estimated value of the deceased's estate (if known)?
What are the liabilities and assets of the deceased (if known)?
What is the likely distribution of the estate and details of any other person who may make a claim on the estate?

Please attach a certified copy of the Inventory of Property of the deceased's estate (if available).

5. Are there any other benefits that may be payable as a result of the death of the deceased? Please provide details of the benefit and the likely distribution.

6. Are there any other details that the Trustee should be aware of (such as family circumstances, details of any financial support, etc)

Declaration

I certify that the information supplied on the pages of this document are true and correct to the best of my knowledge.

Completed by:

Relationship to the deceased: *(for example, spouse, daughter, executor, etc)*

Signature

(dd/mm/yyyy)

You must complete the Statutory Declaration on page 10

Deceased member's name:

C. Trustee consideration of a death benefit

Complete this section if you wish to be considered by the Trustee (ElectricSuper) when we determine who will receive the benefit and in which proportions.

If you DO NOT wish to be considered, please go to Section D (page 8).

Your details

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Name

Residential address

Suburb/Town | State | Postcode

Phone number | Relationship *(for example: spouse, de facto, child, executor, etc)*

For a child under 18, the name of guardian:

Where the form is being completed on behalf of a minor, it must be signed on behalf of the minor by their legal guardian.

You do NOT need to complete the following section if you are executor or administrator of the estate, were married to the deceased at the time of their death or are the legal guardian of the minor.

1. Were you financially dependent on the deceased at the time of their death? ☐ Yes ☐ No

2. Were you in an interdependency relationship with the deceased at the time of their death? ☐ Yes ☐ No

if you answered 'yes' to either of the above questions, please provide specific details on how you were financially dependent or interdependent on the deceased at the time of their death. For an interdependent relationship to be considered, you must provide details of the circumstances of the relationship, including:

- the duration of the relationship and the reputation and public aspects of the relationship,
- whether a sexual relationship existed,
- the degree of emotional support,
- the ownership, use or acquisition of property,
- the extent to which the relationship was one of mere convenience,
- the degrees of mutual commitment to a shared life,
- the care and support of children, and
- the intended permanency of the relationship

Attach any relevant evidence

Proof of your identity

☐ I have attached a certified copy of my proof of identity ☐ I have completed the Statutory Declaration on page 10

You will need to provide certified proof of your identity. See I have completed the Statutory Declaration on page 10 the Completing Proof of Identity sheet in this pack for information and details of suitable identification documents.

You must complete the Statutory Declaration on page 10

Deceased member's name:

D. Intention to NOT be considered by the Trustee in the payment of the death benefit

If you DO NOT wish to be considered by the Trustee (ElectricSuper) when it determines who will receive the death benefit and in which proportions, you need to complete and sign Section D.

You should only complete Section D if you were not wholly or partly financially dependent on the deceased at the time of their death or you did not have an interdependency relationship with the deceased at the time of their death AND you do not wish to be considered by the Trustee when it determines who will receive the death benefit and in which proportions.

By signing Section D, you acknowledge that you will be extinguishing your right to be considered by the Trustee with respect to the deceased's death benefit. You also acknowledge that the Trustee has recommended you carefully consider your position and, if required, seek legal advice.

Your declaration

I, Full name as the Relationship to the deceased

of Full name of the deceased

who resides at:

Residential address

Suburb/Town State Postcode

hereby declare that:

- I was **not** wholly or partly financially dependent on the deceased at the time of their death, and/or
- I did **not** have an interdependency relationship with the deceased at the time of their death, and
- I **do not** wish to be considered by the Trustee when it determines who will receive the death benefit and in which proportions, and
- all the details listed on this form are accurate and correct to the best of my knowledge.

Usual signature

(dd/mm/yyyy)

In the presence of:

Name

Signature

You must complete the Statutory Declaration on page 10

Deceased member's name:

E. Payment to the estate

Please only complete this section if you are the executor or administrator of the member's estate and you are asking for some or all of the superannuation benefit to be paid to the estate.

Estate details

Name of the estate

1. Are you the sole executor or administrator of the estate? ☐ Yes ☐ No

If yes, provide your details below.

If no, provide your details and the details of each executor or administrator below.

Full name	Residential address	Date of birth (dd/mm/yyyy)

If you need more space, please attach an additional sheet.

2. How much of the member's superannuation benefit are you asking to be paid to the estate?

3. If the benefit is paid to the estate, which of the beneficiaries of the estate will receive that superannuation benefit? Provide the FULL NAME of each beneficiary

1.	5.
2.	6.
3.	7.
4.	8.

If you need more space, please attach an additional sheet.

4. Is the will being contested? ☐ Yes. If yes, please tell us about it ☐ No

5. Is there anything else you would like to tell us?

Proof of your identity

Please provide certified proof of identity for one of the executors or administrators mentioned in the table at Question 1 of Section E 'Payment to the Estate'.

Please see the attached information sheet 'Completing Proof of Identity' for further information and details of suitable documents and how to have them certified.

☐ I have completed the Statutory Declaration on page 10

You must complete the Statutory Declaration on page 10

Commonwealth of Australia
STATUTORY DECLARATION
Statutory Declarations Act 1959

1 Insert the name, residential address and occupation of person making the declaration

I, [1] _____

_____

_____

_____

_____

make the following declaration under the Statutory Declarations Act 1959.

2

[2] I declare that all details provided in this form are, to the best of my knowledge, accurate and correct.

I understand that a person who intentionally makes a false statement in a Statutory Declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this declaration are true in every particular.

3 Signature of the person making the declaration

[3]

4 Place
5 Day
6 Month and year

Declared at [4] _____

on [5] _____ day of [6] _____

7 Signature of person before whom the declaration is made

[7]

8 Full name, qualification and residential address of person before whom the declaration is made (in printed letters)

[8] _____

_____

_____

_____

_____

Note 1: A person who intentionally makes a false statement in a Statutory Declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years – see section 11 of the Statutory Declarations Act 1959.

Note 2: Chapter 2 of the Criminal Code applies to all offences against the Statutory Declarations Act 1959 – see section 5A of the Statutory Declarations Act 1959.

electricsuper

Identification (ID) requirements

You'll need to provide proof of identity when you:



Withdraw your super or fully withdraw your income stream or fully commute a Division 3 Pension



Rollover to a self managed super fund (SMSF)



Ask us to search for lost super



Start a retirement income stream or commence a Lifetime Pension



Update your banking details

People signing on your behalf will also need to provide proof of identity.

Three ways you can provide proof of your identity

Option 1.
Electronic ID

This is the easiest way to provide proof of your identity.

Write down the details of your ID on the forms you're sending us. You'll need to have these handy:

1. Medicare card **and**
2. Australian driver's licence or Australian passport

We'll use the details you give us to do an electronic ID check. Please complete all fields on this form. For help locating your driver's licence card number, see page 4.

Option 2.
By email (Selfie ID)

Email us your form and electronic copies (scanned or clear photos) of your ID. Your ID doesn't need to be certified. Send us:

1. A photo of you holding your Australian driver's licence **and** a clear photo of the back of the driver's licence





or a photo of you holding your passport



Take your selfie close-up so we can see the writing on your ID

2. **And** any other documents that may be required – see page 2.

Option 3.
By post or in person (Certified ID)

You'll need to post or give us your form with certified copies of documents:

1. A certified copy of your Australian driver's licence (both sides) or Australian passport **and**
2. Any other documents that may be required – see page 2

See page 3 for how to get your ID certified.

Documents you need to give us

What do you want to do?	Electronic ID	Selfie ID/Certified ID
Withdraw $50,000 or less* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension or **Rollover $50,000 or less* to a SMSF**	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport.
Withdraw more than $50,000* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension **or Rollover more than $50,000* to a SMSF**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made and 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rate or Australian Taxation Office (ATO) notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Open an ElectricSuper Income Stream or Division 3 Pension **or** **Change your ElectricSuper Income Stream or Division 3 Pension banking details**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made **and** 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rates or ATO notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Search for lost super	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** issued concession card **and** 2. One of these: • Phone, electricity, gas or water bill (dated within three months) • Bank statement (dated within six months) • Council rates or ATO notice (dated within 12 months).
Correct your date of birth	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport **or (certified ID only) birth certificate/extract.**
Change your name	Not available	1. Australian driver's licence (both sides) **or** Australian passport . 2. One of these showing a relationship exists between the two (or more) names: • Marriage certificate • Decree absolute (divorce certificate) • Deed poll or Change of name certificate from the Births, Deaths and Marriage Registration Office. *If the name on your account is incorrect (e.g. spelling mistake or employer error), please provide a certified copy of your driver's licence (both sides) or passport and a hard copy Statutory Declaration.*
To sign on behalf of an ElectricSuper member	To set up a Power of Attorney (POA) or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the *Power of Attorney* document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Write your ID details on the *Proving your identity electronically* form. Once the POA/Guardianship is set up, you can use the *Proving your identity electronically* form to sign on behalf of the member. The member's proof of identity will also be required.	To set up a POA or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the Power of Attorney document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Certified ID as indicated in the table above (depending on the type of request). Once your POA/Guardianship is set up, you can use the Proving your identity electronically form to sign on behalf of the member or be required.

* These limits are before tax has been deducted or any interest adjustments.

Hints, tips and troubleshooting

Your ID and account details must match

If you're changing your name, you'll need to provide documentation to prove the change of name (see table on page 2).

Your ID needs to be current and show your name and residential address

Your documents can't be expired, except for an Australian passport which can be used if it expired within the last two years. All certified ID must be dated within 12 months.

Bank statements must show your current name and address

You might be able to download one from your online banking. If your bank account is new and you haven't received a statement yet, you'll need to provide a letter from your bank that shows your name, address, account details and the bank's stamp.

Don't have a driver's licence or passport?

If you don't have a driver's licence or passport, you must provide **four certified documents** from the below list:

1. Bank statement (dated within six months) **and**
2. Birth certificate or birth extract, pension card or Australian citizenship certificate **and**
3. Letter from Centrelink about a benefit, Council rates or ATO notice (dated within 12 months) **and**
4. Phone, electricity, gas or water bill (dated within three months).

If you can't provide the ID we've asked for, give us a call on 1300 307 844 to discuss alternatives.

How to get your ID certified

Take your original documents and a clear photocopy of both sides to an authorised person (see *Who can certify documents*). If documents are written in a foreign language, you'll need to supply an English translation by an accredited translator.

The authorised person needs to:

1. Write or stamp in English on the photocopies words to the effect of 'This is a true and correct copy of the original'.
2. Write their name, qualification (for example, Justice of the Peace, Police Officer, Pharmacist, etc), address and registration number (if applicable).
3. Sign and date the copy.

Example:



* Australia Post may charge to certify ID (contact Australia Post for details).

† These people can certify your ID if you're outside of Australia.

Who can certify documents

You can meet with us in person and we'll certify your documents. Find our details at electricsuper.au/meet-with-us/.

The following authorised people can certify your documents.

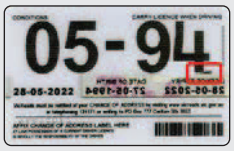
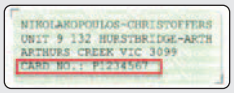
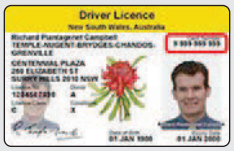
- police officer
- permanent employee or agent of Australia Post* with five or more years' continuous service, who is employed in an office supplying postal services to the public
- finance company officer with two or more years' continuous service (with one or more finance companies)
- officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), with two or more years' continuous service (with one or more licensees)
- notary public officer†
- registrar or deputy registrar of a court
- Justice of the Peace†
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- person enrolled as a legal practitioner on a State or Territory Supreme Court, or the High Court of Australia
- Australian consular officer or diplomatic officer†
- Judge, magistrate† or chief executive officer of a Commonwealth court.

The following people can also certify identification – except if you're rolling over your account to a SMSF:

- dentist
- medical practitioner
- optometrist
- pharmacist

Find your driver's licence card number

Each Australian driver's licence has a unique card number, which is different to your licence number. The location of your driver's licence card number will be different, depending where and when the licence was issued. Check the table below:

Where/when your driver's licence was issued	Location of your card number
Victoria Your licence or learner's permit was issued before November 2022 and you've not reported a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria Your licence or learner's permit was issued after November 2022, or your licence or learner's permit was re-issued due to a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria If you've changed your address, this sticker will be on the bottom left at the back of the card and it will show your card number.	
New South Wales	
Northern Territory Your licence was issued before 10 December 2020.	
Northern Territory Your licence was issued from 10 December 2020 onwards.	

Where/when your driver's licence was issued	Location of your card number
Australian Capital Territory (ACT)	
Queensland Your licence was issued before June 2019.	
Queensland Your licence was issued after June 2019.	
South Australia	
Tasmania	
Western Australia	

Please send us your form with your ID

By email: If you're providing Selfie ID. You need to use the email address that's on your ElectricSuper account.

By post or in person: If you're providing certified ID or a hard copy of a POA/Statutory Declaration.

If you need help with proof of identity, call us on the number below, or arrange to meet with us – head to **https://electricsuper.au/meet-with-us/** to find how.

electricsuper.admin@rs.mpms.mufg.com
electricsuper.com.au

1300 307 844
7.30 am to 5.30 pm
(ACST/ACDT)
Monday to Friday

ElectricSuper
PO Box 126
PARRAMATTA NSW 2124

Meet us in person
electricsuper.au/meet-with-us/

Issued by the Electricity Industry Superannuation Board ABN 57 923 283 236 as Trustee of the Electricity Industry Superannuation Scheme. Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

1602.4 11/26 ISS1