

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 3 in this pack for the definition)
- all known dependants of the deceased (see page 3 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
- a 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
- a 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)

Death Claim Kit

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.



When complete, post your forms to:

ElectricSuper,
Level 1, 89 Pirie Street,
Adelaide SA 5000

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.

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.



Your insurance

Making a death claim: Important information

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, Mercer Outsourcing (Australia) Pty Ltd. 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.com.au/privacypolicy. If you do not provide the personal information requested, we may not be able to manage your claim.

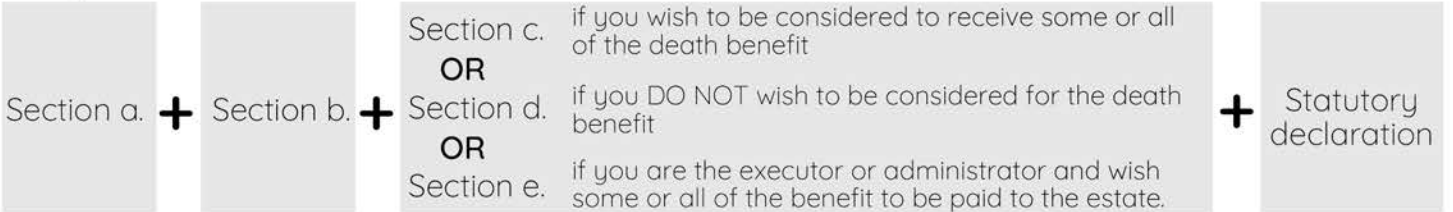


electric
super



Declaration in respect of a death benefit payment

Complete the relevant sections in full:



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:

_____ street address
_____ suburb _____ state _____ postcode

Member's ElectricSuper member number: (if known) _____

Member's tax file number: (if known) _____

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: _____
street address

_____ suburb _____ 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: _____
street address

_____ suburb _____ 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: _____
street address

_____ suburb _____ 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: _____
street address

_____ suburb _____ 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: _____

b. Dependency details and estate information (continued)

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: _____
street address

_____ suburb _____ state _____ postcode

Phone number: _____ Relationship: _____
(for example: sister, parent, etc)

Name: _____ Age: _____

Residential address: _____
street address

_____ suburb _____ 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: _____
street address

_____ suburb _____ state _____ postcode

Phone number: _____ Relationship: _____
(for example: sister, parent, etc)

Name: _____ Age: _____

Residential address: _____
street address

_____ suburb _____ 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: _____
print name

Relationship to the deceased: _____
for example, spouse, daughter, executor, etc

Signature: _____ Date: _____



You must complete the Statutory Declaration on page 13

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 10).

Your details

Mr Mrs Ms Other _____ Date of birth: _____

Name: _____

Residential address: _____
street address

_____ suburb _____ 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 13

You will need to provide certified proof of your identity. See 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 13

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: _____,

street address

suburb

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: _____ Date: _____

In the presence of: _____

name

signature



You must complete the
Statutory Declaration
on page 13

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

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:

Full name	Full name

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

Deceased member's name: _____

e. Payment to the estate

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 13



You must complete the
Statutory Declaration
on page 13

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

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

Declared at ⁴ _____

5 Day

on ⁵ _____ day of ⁶ _____

6 Month and year

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.

Completing proof of identity

Primary photographic identification

You will need to provide a copy of one of the following primary identification documents:

- current Australian or foreign driver's licence (including the back of the licence if your address has changed)
- Australian passport
- current foreign passport* or similar document issued for the purpose of international travel*
- current card issued under a State or Territory for the purpose of proving a person's age
- current national identity card issued by a foreign government for the purpose of identification*

Identification documents must not be expired (except an Australian passport which may be expired within 2 years).

Alternative identification

If you are unable to provide any primary photographic identification, you will need to provide 2 identification documents, one from each of the following lists:

- Birth certificate or birth extract*
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Services Australia (Centrelink) that entitles the person to financial benefits

AND

- Letter from Services Australia (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills are not accepted)

Name change

if you have changed your name, you must provide a certified copy of the relevant name change document*, for example a marriage certificate issued by the Registry of Births, Deaths and Marriages, a Decree Nisi or Deed Poll (in addition to the above identification).

If your legal name or date of birth does not match exactly to our records (excluding aforementioned name changes), please contact us for further instructions.

How to have a document certified

To certify your documents, the authorised person needs to:

1. Compare the photocopy to the original
2. Write the following details on the copy:
 - 'Certified true copy', and
 - their name, qualification and registration number (if applicable), and
 - sign and date the photocopy

The date of certification must be within 12 months



Verification

We may verify the certifying party. If a discrepancy arises, you may be asked to provide re-certified documentation.

Signing on behalf of another person

If you are signing on behalf of the applicant, you will need to provide certified copies of following:

- the Guardianship papers or Power of Attorney, and
- the appropriate proof of identity for the holder of the Guardianship or Power of Attorney

Certified ID is still also required for the member.

* Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation) to translate from a language other than English into English.

Completing proof of identity

Who can certify documents in Australia?

- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Agent of the Australian Postal Commission who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank officer, building society officer or credit union officer (with 2 or more continuous years of service)
- Commissioner for Affidavits or Declarations
- Court Officer, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- Fellow of the National Tax Accountant's Association
- Finance Company Officer (with 2 or more continuous years of service with one or more finance companies)
- Justice of the Peace
- Legal practitioner
- Marriage celebrant (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- Medical practitioner, chiropractor, dentist, nurse, optometrist, physiotherapist, psychologist
- Member of Chartered Secretaries Australia
- Member of Engineers Australia (other than at the grade of student)
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- 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 2 or more years of continuous service or a warrant officer within the meaning of that Act)
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or Member of the Institute of Public Accountants
- Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority (State or Territory)
- Minister of Religion (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- Notary Public
- Officer with, or Authorised Representative of an Australian Financial Services Licensee (who has had at least 2 years of continuous service with one or more licensees)
- Officer with, or a credit representative of, a holder of an Australian credit licence (who has had at least 2 years of continuous service with one or more licensees).
- Permanent employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority) or a Local Government Authority with two or more years of continuous service
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Pharmacist
- Police Officer, Sheriff or Sheriff's Officer
- Senior Executive Service Employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority)
- Teacher employed on a full-time basis at a school or tertiary education institution
- Trade marks attorney
- Veterinary surgeon

Who can certify documents outside of Australia?

- an authorised staff member of an Australian Embassy, High Commission or Consulate
- an authorised employee of the Australian Trade Commission who is in a country or place outside Australia
- an authorised employee of the Commonwealth of Australia who is in a country or place outside Australia
- a Member of the Australian Defence Force who is an officer or a non-commissioned officer with 5 or more years of continuous service
- a Notary Public from a country ranked 129 or below in the latest Transparency International Corruptions Perception Index: www.transparency.org