

# Application for direct payment of super co-contribution

## WHO SHOULD COMPLETE THIS APPLICATION?

You should complete this application if you want to request a direct payment of your co-contribution payment.

You can only apply for a direct payment if:

- you have retired due to permanent disability and don't have an active, eligible superannuation account
- you have retired, having reached preservation age, don't have an active, eligible superannuation account
- you are authorised to apply on behalf of a person who is eligible for a reason listed above, or
- you are the legal representative authorised to apply on behalf of a deceased person.

If you do not meet the eligibility criteria, we can't make a direct payment. We can only pay your co-contribution to your super fund or retirement savings account. To update your current super fund details use the *Superannuation fund nomination* (NAT 8676). You can obtain a copy by:

- visiting our website at [www.ato.gov.au](http://www.ato.gov.au)
- phoning us on **13 10 20** between 8.00am and 6.00pm, Monday to Friday.



## HOW DO I COMPLETE THIS APPLICATION?

### Section A: Reason for application

#### Question 1

##### Why are you applying for direct payment?

Complete by placing an 'x' in the applicable box, identifying why you are applying for a direct payment.

⚠ Before we can pay the co-contribution for a deceased person, a final tax return must be lodged on their behalf. We pay the co-contribution directly to their authorised person.

### Section B: Retired or deceased person's details

⚠ This is the individual the co-contribution relates to.

Provide your details as they appear on your account, statement or Tax Office correspondence.

➡ For more information on making this application on behalf of a retired or deceased person, refer to 'Section D' on page 3 of these instructions.

#### Question 2

##### Tax file number

Provide your tax file number (TFN).

You don't have to provide your TFN to us. However, if you do, it will help us process your claim.

#### Question 3

##### Name

Provide your full name.

#### Question 4

##### Residential address

Provide your residential address.

#### Question 5

##### Postal address

Provide your postal address.

If this is the same as your residential address, write 'as above'.

#### Question 6

##### Daytime phone number

Provide your daytime phone number including the area code.

#### Question 7

##### Date of birth

Provide your date of birth.

#### Question 8

##### Correspondence reference number

Provide your correspondence reference number, if possible.

You will find the reference number on documents such as your:

- super co-contributions advice letter, or
- request for superannuation fund nomination letter.

Your reference number is on the top right hand corner.

### Section C: Retired or deceased person's supporting documentation

Complete by placing an 'x' in the applicable boxes.

You must provide certified copies of the relevant documents to support your application.

⚠ Do not send originals and do not use pins or staples.

All copied pages of original documents must be certified as true and correct copies by a:

- barrister
- doctor
- judge
- Justice of the Peace
- minister of religion who is authorised to celebrate marriages
- police officer with a rank of sergeant or above, or the highest ranking officer in the station
- bank, building society or credit union officer with at least 5 years service
- sheriff's officer, or
- solicitor.

They must sight the original document and the copy and certify that each page is a true copy by writing or stamping 'certified true copy', followed by:

- their signature
- their printed name
- their qualification (for example Justice of the Peace), and
- the date.

⚠ If you are outside Australia you can take the original documents to the Australian Embassy, High Commission or Consulate. The staff can photocopy and certify them.

#### Have you changed your name?

If you have changed your name, you need to provide proof, for example, a marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.

## Section D: Authorised person's details

⚠ If you are applying because you have retired, you don't need to complete this section.

Only complete this section if you are authorised to act as a legal representative on behalf of a retired or deceased person.

### Question 9 Authorisation

Provide details of your authority to make this application on behalf of the retired or deceased person for example, if you have a power of attorney or are an estate trustee.

### Question 10 Name

Provide your full name.

### Question 11 Residential address

Provide your residential address.

### Question 12 Postal address

Provide your postal address.

If this is the same as your residential address write 'as above'.

### Question 13 Daytime phone number

Provide your daytime phone number including the area code.

## Section E: Authorised person's supporting documentation

⚠ If you are applying because you have retired, you don't need to complete this section.

Complete by placing an 'x' in the applicable boxes.

You must provide certified copies of the documents you have marked on the list on page 3 of the application, if you are authorised to act on behalf of the retired or deceased person.

⚠ Do not use pins or staples.

### Have you changed your name since taking on this role?

If you have changed your name, you need to provide proof, for example, a marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.

➔ For more information about certifying copies of documents, refer to 'Section C' on page 2 of these instructions.

## Section F: Declaration

You need to complete one declaration. If you are applying because you have retired, complete the declaration by retired person. If you are applying because you are authorised to act on behalf of a retired or deceased person, complete the declaration by authorised person.

## HOW TO LODGE YOUR APPLICATION

Keep a copy of this application for your records and send the original, together with copies of your supporting documents to us at:

**PO Box 3578  
ALBURY NSW 2640**

## MORE INFORMATION:

For more information about the super co-contributions:

- visit our website at [www.ato.gov.au](http://www.ato.gov.au)
- phone us on **13 10 20** between 8.00am and 6.00pm, Monday to Friday, or
- write to us at  
**PO Box 3578**  
**ALBURY NSW 2640**

If you do not speak English well and want to talk to a tax officer, phone the Translating and Interpreting Service on **13 14 50** for help with your call.

If you have a hearing or speech impairment and have access to appropriate TTY or modem equipment, phone **13 36 77**. If you do not have access to TTY or modem equipment, phone the Speech to Speech Relay Service on **1300 555 727**.

## OUR COMMITMENT TO YOU

We are committed to providing you with guidance you can rely on, so we make every effort to ensure that our publications are correct.

If you follow our guidance in this publication and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we must still apply the law correctly. If that means you owe us money, we must ask you to pay it but we will not charge you a penalty. Also, if you acted reasonably and in good faith we will not charge you interest.

If you make an honest mistake in trying to follow our guidance in this publication and you owe us money as a result, we will not charge you a penalty. However, we will ask you to pay the money, and we may also charge you interest.

If correcting the mistake means we owe you money, we will pay it to you. We will also pay you any interest you are entitled to.

If you feel that this publication does not fully cover your circumstances, or you are unsure how it applies to you, you can seek further assistance from us.

We regularly revise our publications to take account of any changes to the law, so make sure that you have the latest information. If you are unsure, you can check for a more recent version on our website at [www.ato.gov.au](http://www.ato.gov.au) or contact us.

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## WHEN COMPLETING THIS APPLICATION

- Print clearly in BLOCK LETTERS using a black pen.

S M I T H S T

- Place  in ALL applicable boxes.
- If a question does not apply, leave it blank.
- Do not use whiteout or correction tape.

## Section A: Reason for application

### 1 Why are you applying for direct payment?

- I am retired, having reached preservation age, and don't have an active, eligible superannuation account.
- I have retired due to permanent disability and don't have an active, eligible superannuation account.
- I am authorised to apply on behalf of a deceased person.

## Section B: Retired or deceased person's details

### 2 Tax file number

**!** We are authorised under the *Taxation Administration Act 1953* to collect your tax file number (TFN). You don't have to provide your TFN to us, however, if you do not provide your TFN, this processing may be delayed.

### 3 Name

Title: Mr  Mrs  Miss  Ms  Other

Family name

First given name  Other given name

### 4 Residential address

Suburb/town/locality  State/territory  Postcode

(Australia only) (Australia only)

Country if outside Australia

### 5 Postal address

Suburb/town/locality  State/territory  Postcode

(Australia only) (Australia only)

Country if outside Australia

### 6 Daytime phone number (including area code)





