



Australian Government



Centrelink

# Claim for Bereavement Allowance

# 2

This form tells you

- **how to claim in 4 easy steps**

This form asks about

- your **personal** details
- your **bank account for payment** and **tax** details
- your **residence in Australia and overseas**
- your **accommodation**

Not all the questions in this form will apply to you. You will be able to **skip questions** which don't apply.

If your circumstances are fairly **simple** and you have information readily at hand, you should be able to complete this particular form in **under 20 minutes**.

You will also have to complete the **Income and assets** form.

With this form you should have received the booklet **Information you need to know about your claim for Bereavement Allowance**.

If you don't have this booklet, call Centrelink on **13 2300** or go to our website at **www.centrelink.gov.au**

## How to claim

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### Forms in your claim pack

#### **In your claim pack, you should have the following forms:**

- *Information you need to know about your claim for Bereavement Allowance*
- *Claim for Bereavement Allowance*
- *Income and assets*

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#### **Other forms you may need to complete this claim**

Depending on your circumstances you may have to fill in other forms.

- *Rent Certificate*
- *Authority for a nominated person*
- *Private trust form (Mod PT)*
- *Private company form (Mod PC)*
- *Business details form (Mod F)*

**If you do not have any forms you need or you require additional forms, call Centrelink on 13 2300 or go to our website at [www.centrelink.gov.au](http://www.centrelink.gov.au)**

## How to claim in 4 easy steps

Remember to return your forms to Centrelink **within 14 days** to ensure you are paid from the earliest date possible.

If you cannot return the forms within 14 days, contact Centrelink for an extension.

It is very important that you contact Centrelink and lodge your claim as soon as possible because Bereavement Allowance is only a short-term payment. If you claim within the 4 weeks following your partner's death, you may receive arrears provided you qualify. If you leave it too late to claim, usually after 14 weeks, you will not qualify for payment unless you are pregnant and were pregnant when your partner died.

### Step 1

#### Fill in the forms

Fill in all the forms you need to complete.

Please use black or blue pen. **Initial any corrections you make.**

Check that you have answered all the questions you need to answer, and that you have signed and dated the forms.

You may choose to use an accountant or financial adviser to complete your *Income and assets form* (but you must sign it).

If you need other people to complete forms, make sure you give them the forms as soon as possible.

### Step 2

#### Collect all the documents you need

You will need to provide documents to **prove your identity** to Centrelink (there is a list of acceptable documents in the booklet *Information you need to know about your claim for Bereavement Allowance*).

The forms will also tell you which **other documents** you need to provide to support your claim (such as bank statements and other documents relating to your income and assets).

**Use the checklist** at the end of each form to make sure you have collected all the required documents.

Please remember that we need to see **original** documents (please do not provide photocopies).

### Step 3

#### Arrange an interview

When you have filled in your forms and collected all your **original** documents, you should arrange to have an interview (at which you will lodge your application).

If an interview hasn't already been arranged, please call **13 1021** to make an appointment.

If you cannot come in for an interview, you can arrange to mail your forms and documents to Centrelink.

### Step 4

#### Lodge your application

If you have an interview, bring your completed forms and all the **original** documents you need to provide. At the interview, we will discuss your claim, tell you what happens, tell you about other services you might need, and answer any questions you have.

At the interview, we will 'sight' your original documents and photocopy them for our records. You will then be able to take your documents away with you.


If you lodge your claim by post, send **original** documents. We will photocopy them and return the originals to you by registered post.

**PART A****Personal details**

<b>A1 Your full name</b>	Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="text"/>
	Family name	<input type="text"/>				
	First given name	<input type="text"/>				
	Second given name	<input type="text"/>				

<b>A2 Have you ever used or been known by other names?</b> e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias.	No <input type="checkbox"/>		
	Yes <input type="checkbox"/>	▶ List the other names	Type of name (e.g. maiden name)
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>

<b>A3 Sex</b>	Male <input type="checkbox"/>	Female <input type="checkbox"/>
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<b>A4 Date of birth</b>	<input type="text" value="/"/>	<input type="text" value="/"/>	<input type="text" value=""/>	 Please attach an original of your birth certificate or other acceptable document to prove your date of birth.
<input type="text"/>				

<b>A5 Country of birth</b>	<input type="text"/>
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<b>A6 Country of citizenship</b> List all countries of which you are a citizen.	<input type="text"/>
	<input type="text"/>

The following question is an optional question which will not affect your payment. If you do answer, the information will help us to continue to improve services to Aboriginal, Torres Strait and Australian South Sea Islander peoples.

<b>A7 Are you of Aboriginal, Torres Strait or Australian South Sea Islander origin?</b> For persons of more than origin, tick more than one 'Yes' box.	No <input type="checkbox"/>
	Yes, Aboriginal <input type="checkbox"/>
	Yes, Torres Strait Islander <input type="checkbox"/>
	Yes, Australian South Sea Islander <input type="checkbox"/>

<b>A8 Do you need an interpreter when dealing with Centrelink?</b> This includes an interpreter for people who are deaf or hearing impaired.	No <input type="checkbox"/>		
	Yes <input type="checkbox"/>	▶ Preferred written language?	<input type="text"/>
		Preferred spoken language?	<input type="text"/>

<b>A9 Home address</b> (the address where you live)	<input type="text"/>
	<input type="text"/>
	POSTCODE

<b>A10 Postal address</b> If same as home address, write 'AS ABOVE'.	<input type="text"/>
	<input type="text"/>
	POSTCODE

**PART A** *continued* • **Personal details****A11 Do you have a phone number where you live?**No Yes  ► Phone number

You may be able to get assistance with your telephone costs.

Can we contact you on this number? No  Yes Is this a silent number? No  Yes Is the account in your name? No  Yes **A12 Are there other numbers you can be contacted on?**No Yes  ► Mobile

Fax

Email

Work

Other

Type of number

Number

**A13 Have you claimed or received a social security payment at any time in the last 10 years?**No Yes  ► What payment did you last claim or receive?

This does NOT include Family Tax Benefit.

Customer reference number (if known)

**A14 Were you in a marriage-like relationship with your partner when they died?**No Yes **A15 Have you remarried or entered into a de facto relationship since the death of your partner?**No Yes

**PART B****Deceased partner details****B1 Your deceased partner's full name**

Family name

First given name

Second given name

**B2 Sex**Male  Female **B3 Date of birth****B4 Date of death**

Please attach an original death certificate

**PART C****Your payment details****C1 Give details of the account you want your payment made to**

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

Name of bank, building society or credit union

Type of account (e.g. savings, cheque)

Branch where your account is held

Branch number (BSB)

Account number (this is not always the number printed on your card)

Account held in the name(s) of

**C2 Is there a particular day you wish to be paid on?**

e.g. Thursday

No

Yes  ► Which day?

If your **only income** for the financial year is this payment, you will not have to pay income tax—and you **do not need to have tax taken out** of your payment.

However if you have other income, you may have to pay income tax. In the following question, you can tell us how much tax to take out of your payment.

**C3 Do you want to have tax taken out of your payment?**

You can ask us in writing to change this tax deduction at any time.

No

Yes  ► \$  per fortnight

When you complete the *Income and assets* form, you will be asked to show amounts in your bank accounts.

Remember to show the amount you have in the account(s) shown above.





**PART E** *continued* • **Residence in Australia and overseas****E5** **Have you ever WORKED in a country other than Australia?**No  ► Go to **PART F** on page 12Yes  ► List the countries (*If the country no longer exists, give the current country*)


**For each of these countries, give the following details**


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**Country 1**


Name of country

Number of years you worked in that country

Occupation (e.g. miner, agricultural, public servant)


Date you first departed that country  /  /

Do you get a social security type pension or payment from that country?

Yes  ►  Please attach your most recent advice from the paying authority.

No  ► Give the reason

Claim in progress

Claim rejected  Please attach the rejection letter.

Intend claiming  /  /

Never claimed and do not intend claiming

because:

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**Country 2**


Name of country

Number of years you worked in that country

Occupation (e.g. miner, agricultural, public servant)


Date you first departed that country  /  /

Do you get a social security type pension or payment from that country?

Yes  ►  Please attach your most recent advice from the paying authority.

No  ► Give the reason

Claim in progress

Claim rejected  Please attach the rejection letter.

Intend claiming  /  /

Never claimed and do not intend claiming

because:

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**PART E** *continued* • **Residence in Australia and overseas****E5 (continued)**


**Country 3** Name of country


Number of years you worked in that country

Occupation (e.g. miner, agricultural, public servant)


Date you first departed that country  /  /

Do you get a social security type pension or payment from that country?

Yes   Please attach your most recent advice from the paying authority.

No   Give the reason

Claim in progress

Claim rejected  Please attach the rejection letter.

Intend claiming  /  /

Never claimed and do not intend claiming

because:


**Country 4** Name of country


Number of years you worked in that country

Occupation (e.g. miner, agricultural, public servant)


Date you first departed that country  /  /

Do you get a social security type pension or payment from that country?

Yes   Please attach your most recent advice from the paying authority.

No   Give the reason

Claim in progress

Claim rejected  Please attach the rejection letter.

Intend claiming  /  /

Never claimed and do not intend claiming

because:

**PART F****Accommodation**

**F1** Which of the following best describes where you live?

**In a home you own**

This includes paying it off (mortgage).

Go to **PART G** on page 15

**In a home you own jointly with another person or organisation**

Go to **PART G** on page 15

**In a retirement village**

Go to **Question F2** on the next page

**In a hospital or home for people with disabilities**

Go to **Question F3** on the next page

**In a residential aged care home (nursing home or hostel) which provides nursing care**

Go to **Question F4** on the next page

**In accommodation which you have the right to use free for life**

Such as a granny flat to use for life.

Go to **Question F5** on the next page

**In public housing**

That is, in housing owned by a public housing authority such as the Housing Commission or Department of Housing.

Go to **Question F6** on page 14

**In a place where you pay private rent**

Go to **Question F7** on page 14

**In a place where you pay private board and lodging**

Go to **Question F8** on page 14

**In a home held by a private trust**

Go to **PART G** on page 15

**In a home owned by a private company**

Go to **PART G** on page 15


**Other**—please describe


Go to **PART G** on page 15


**PART F** *continued* • **Accommodation****Retirement village****F2 Give details about your accommodation in the retirement village**

- ▶ On what date did you move into this accommodation?
- ▶ Did you pay an entry contribution? No   
Yes  ▶ How much? \$
- ▶ How much do you pay on-going for your accommodation? Amount \$  per   
Date you started paying
- ▶ Go to **PART G** on page 15

**Hospital or home for people with disabilities****F3 Give details about your accommodation in the hospital or home**

- ▶ On what date did you move into this accommodation?
- ▶  Please attach your latest lease or tenancy agreement.
- ▶ Go to **PART G** on page 15

**Residential aged care home (nursing home or hostel) which provides nursing care****F4 Give details about your accommodation in the nursing home or hostel**

- ▶ Is this nursing home or hostel an **approved** aged care facility? No  Yes   
*If you are unsure check with your accommodation provider.*
- ▶ Did you pay an accommodation bond or charge? No   
Yes  ▶  Please attach the Accommodation Bond or the Accommodation Charge Agreement.
- ▶ How much do you pay on-going for your accommodation? Amount \$  per   
Date you started paying
- ▶ Go to **PART G** on page 15

**Life interest****F5 Did you pay a sum of money or transfer any assets to another person in return for this accommodation for life?**

- No  ▶ Go to **PART G** on page 15
- Yes  ▶
- |                                    |                                  |
|------------------------------------|----------------------------------|
| To whom?                           |                                  |
| Name of person or organisation     | <input type="text"/>             |
| Address                            | <input type="text"/>             |
|                                    | Postcode <input type="text"/>    |
| Date paid/transferred              | <input type="text" value="/ /"/> |
| Amount paid                        | \$ <input type="text"/>          |
|                                    | OR                               |
| What assets were transferred       | <input type="text"/>             |
| Market value of assets transferred | \$ <input type="text"/>          |
- Go to **PART G** on page 15

**PART F** continued • **Accommodation****Public housing****F6 Are you the Primary Tenant?**

That is, your name is on the rental contract (lease) with the Public Housing Authority.

Yes  ▶ Go to **PART G** on the next page

No  ▶ Do you pay the Primary Tenant for your accommodation?

No  ▶ Go to **PART G** on the next page

Yes  ▶ Does the State or Territory Housing Authority know that you are living at this address?

Yes  ▶

No

Don't know

Is the Primary Tenant paying rent at the market rate?

Yes

No

Don't know

How much do you pay for your accommodation?

\$

per

Go to **PART G** on the next page


**Private rent****F7 Give details of the rent**

▶ Total rent for the accommodation \$

per

▶ Do you share the rent with anyone? No

Yes  ▶ What is your share? \$

▶  Please attach your **latest lease or tenancy agreement**. If you don't have one, then the **Rent Certificate** form (**SU523**) must be completed and attached. If you do not have this form, call Centrelink on **13 2300** or go to our website at **www.centrelink.gov.au**

▶ Go to **Question F9** below

**Private board and lodging****F8 Give details of your board and lodging**

▶ Amount paid for meals


\$

per

▶ Amount paid for lodging

\$

per

▶  Please attach your **latest lease or tenancy agreement**. If you don't have one, then the **Rent Certificate** form (**SU523**) must be completed and attached. If you do not have this form, call Centrelink on **13 2300** or go to our website at **www.centrelink.gov.au**

▶ Go to **Question F9** below

**Sharing accommodation (private rent, board and lodging)****F9 Do you share your accommodation with anyone who receives or is claiming Rent Assistance?**

No  ▶ Go to **PART G** on the next page

Yes  ▶

Person's full name

Relationship to you

Their share of the cost of accommodation

\$ per fortnight

\$ per fortnight

\$ per fortnight

Go to **PART G** on the next page

**PART G****Other questions**

**G1** Did a Centrelink officer help you complete this form?

No

Yes  ▶ Name of the Centrelink officer

**G2** Give details if you want to nominate a person to act on your behalf

**For this claim only**  ▶ If you want to nominate a person to act on your behalf **for this claim only**, give their contact details

Their name

Address



Postcode

Phone number

(      )

**For all on-going dealings with Centrelink**

▶



You must complete and attach the **Authority for a nominated person** form (**SS313**). If you do not have this form, call Centrelink on **13 2300** or go to our website at **www Centrelink.gov.au**

You will be able to cancel or change this authority at any time.

**PART H****Attachment checklist****Proving your identity to Centrelink**

You must attach **original** documents which prove your identity.

A list of acceptable documents is in the information booklet *Information you need to know about your claim for Bereavement Allowance* in the part 'Proving your identity to Centrelink'.

**Attachments for questions in the claim form**

If you are unsure, check the questions to see if you should attach the documents.

You may have already selected some of these documents for your proof of identity.

You must provide **original** documents, not photocopies.

**PART A – Personal details**

Question **A4**  An original of your birth certificate or other acceptable documents to prove your date of birth.

**PART B – Deceased partner details**

Question **B4**  An original of your partner's death certificate

**PART G – Residence in Australia and overseas**

Question **E1**  Documents that show you are legally allowed to remain in Australia— e.g. Australian passport, New Zealand passport, Certificate of Australian Citizenship, or passport showing your permanent resident visa.

**E2**  Documents that show you are living permanently in Australia: e.g. current rental lease or home ownership papers; employment records; children's birth certificates, school records or other documents; details of bank accounts held in Australia; tax returns from previous years.

**E5**  The most recent advice from the paying authority of the overseas social security pension or payment; or if the claim was rejected, the rejection letter.

**PART F – Accommodation**

Question **F3**  Your latest lease or tenancy agreement.

**F4**  The Accommodation Bond or the Accommodation Charge Agreement.

**F7**  Your latest lease or tenancy agreement. If you don't have one, then the  
**F8**  **Rent Certificate** form (**SU523**) must be completed and attached.

**PART G – Other questions**

Question **G2**  If you would like to nominate a person to act on your behalf when dealing with Centrelink – the **Authority for a nominated person** form (**SS313**).

If you do not have a form that you have to complete, call Centrelink on **13 2300** or go to our website at **www.centrelink.gov.au**

**PART I****Your statement**

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Before you sign this statement, you should read the information about privacy and penalties in the booklet *Information you need to know about your claim for Bereavement Allowance* in the part 'About the information you give'.

**Statement**

I declare that the information I have given is correct.

I understand that giving false or misleading information is a serious offence.

**YOUR SIGNATURE**



Date

/ /