



## When to use this form

Use this form to claim an Australian pension.

## For more information

- Call Services Australia, direct (free of charge) on **1866 3433 086**. You can call us between 8 am and 5 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in the United States. If this service is not available call us on **+61 3 6222 3455**.
- You can write to us by:
  - mail at: **Services Australia  
International Services  
PO Box 7809  
CANBERRA BC ACT 2610  
Australia**
  - fax to: **+61 3 6222 2799**Include your phone number (including country and area code), so we can quickly respond to your query.
- **Information online** – If you would like further information on Centrelink services and payments, you can go to our website at **[servicesaustralia.gov.au](http://servicesaustralia.gov.au)**

**Keep these Notes for claiming Australian Pension (PART 1),  
pages 1 to 9, for your future reference.**

## Forms in your claim pack

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

### **PART 1 Notes for claiming Australian Pension**

This part tells you important information about claiming, your rights and obligations. You should read this information and keep it for future reference.

### **PART 2 Claim for Australian Pension**

You and your partner (if you have one) must answer **all** questions in the claim form.

**Important Note:** You must return **all** supporting documents at the same time you lodge your claim form. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

## Other forms you may need to complete

If you are claiming Disability Support Pension, you will need to complete a **Work capacity – Customer Information (AUS142US)** form and have your doctor complete a **Treating doctor's report (AUS109)**.

If you do not have these forms, you can download them from [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms) or contact Services Australia.

## Your partner

You have a partner if we consider you a member of a couple. We consider you a member of a couple if you are:

- married
- in a registered relationship, or
- in a de facto relationship.

A registered relationship is where your relationship is registered under a law of an Australian state or territory.

If your relationship is registered outside Australia, we do not recognise it as a registered relationship. You can use it as evidence for a de facto relationship. A de facto relationship is where you and your partner are in a relationship similar to a married couple but are not married or in a registered relationship.

You must answer all questions and provide all requested information about your partner, even if your partner has never been to Australia or is not claiming or receiving an Australian pension.

Your partner (if you have one) can also use this claim form if they want to claim an Australian pension. Complete question 1 in **PART 2** and make sure that all questions are answered by your partner as well as yourself.

## Partner permitted to enquire

Allowing your partner to enquire on your behalf, may save you time when dealing with us. It will let you and your partner use more self-service functions online and over the phone.

If you give your partner **permission to enquire**, it will allow your partner to ask questions about your Centrelink payments and services. They could ask us:

- your current rate of payment
- the reason your payment has stopped
- the reason your payment has gone up or down, for example, income and assets, debt and back payment information.

They **can** tell us how much employment income you were paid, changes in your circumstances and view your details online.

They **cannot**:

- act on your behalf with Services Australia
- apply for payments for you
- fill in and sign forms and statements on your behalf
- come to appointments for you.

*Continued*

You have a right to have your personal information kept private. For more information, go to [servicesaustralia.gov.au/privacypolicy](https://servicesaustralia.gov.au/privacypolicy)

**Changing your partner's permission to enquire is your choice and you can change this permission at any time.**

If you think your partner is misusing the arrangement, contact us.

## Filling in this form

Use black or blue pen.

Print in BLOCK LETTERS

Where you see a box like this  ► **Go to 1** skip to the question number shown.

If you need more space for answers, use a separate sheet.

## Returning your forms

Check that all required questions are answered and that all forms are signed and dated.

**Important Note:** You must return **all** supporting documents at the same time as you lodge your claim. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

You can return forms and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicesaustralia.gov.au/centrelinkuploaddocs](https://servicesaustralia.gov.au/centrelinkuploaddocs)
- **in person** at your local US Social Security Administration (SSA) field office.
- **by post** to your local US Social Security Administration (SSA) field office.
- **by post** to Services Australia:

Services Australia  
International Services  
PO Box 7809  
CANBERRA BC ACT 2610  
Australia

While you can lodge your forms direct with us, lodging with your local SSA field office will normally make it easier and faster for you to receive a decision on your claim.

If you lodge with your local SSA field office they will copy original documents for you and return them to you. The SSA field office will forward all forms and supporting documentation to the international section of the SSA. The international section will forward everything to Services Australia.

If you send original documents to us, we will make copies and return the original documents to you.

The claim forms do not need to be copied. If you do copy the claim forms, make sure you keep a copy, not the original.

If you need advice call us direct (free of charge) on **1866 3433 086** between 8 am and 5 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in the USA. If this service is not available call us in Australia on **+61 3 6222 3455**.

# Australian pension – what you can claim

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## Requirements

To claim an Australian pension, a period of permanent Australian residence must be proved.

You must have lived in Australia on a long-term basis with a permanent residence visa or as an Australian citizen. Holidays in Australia are not included. Holidays or short trips outside Australia while you were living in Australia are included as part of your residence in Australia.

**If you have never lived in Australia you cannot be paid an Australian pension.**

The amount of pension you get paid will depend on how long you have lived in Australia between the ages of 16 and Age Pension age.

The amount of pension usually also depends on your (and/or your partner's) income and assets.

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**You should claim Age Pension if:**

- you are at least 67 years old, **AND**
- you have lived in Australia for more than 10 years, OR
- the period of time you have lived in Australia and the period of time that you paid contributions in the USA adds up to more than 10 years.

**Important note**

To make sure you are paid from the earliest possible date, you should lodge your claim as soon as possible. Age Pension claims can be lodged up to 13 weeks before you reach Age Pension age. You may lodge your form without the other forms and documentation outlined in the Checklist, however, they will need to be provided before the claim can be processed.

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**You should claim Disability Support Pension if:**

- you are aged between 16 and Age Pension age, **AND**
- you are unable to work because of a disability or are permanently blind, **AND**
- your disability occurred while you were living in Australia, OR
- you have lived in Australia for more than 10 years, OR
- the period of time you have lived in Australia and the period of time that you paid contributions in the USA adds up to more than 10 years.

'Work' means any type of work which is over 8 hours per week. This is not limited to your usual occupation.

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**You should claim Carer Payment if:**

- you are providing full-time care for your partner, **AND**
  - you have lived in Australia, **AND**
  - your partner is receiving an Australian Age Pension or Disability Support Pension.
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**You should claim Parenting Payment if:**

- you are a widow or widower and you are still single, **AND**
- you have lived in Australia, **AND**
- you are caring for one or more children under 14 years of age who have been to Australia or have been an Australian resident.

## Information about claiming Australian pension

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### What you will need

As a customer you may be required to confirm your identity when claiming a payment or service from Services Australia.

#### **If you lodge with your local SSA field office, they will confirm your identity for you.**

If you choose to send your claim directly to us, you must confirm your identity by providing **original documents** (not copies) from the approved list below. We will return your original documents to you.

We need you to provide:

- One document to show **either** proof of birth in Australia (for example, Australian birth certificate) **OR** proof of arrival in Australia (for example, visa in your passport).

#### **AND**

- Other documents listed below which add up to 100 points. This list is not complete, other documents may be accepted.

**Note:** You cannot use the same document to make up 100 points if you use it for proof of birth in Australia or proof of arrival in Australia.

<b>Australian documents</b>	<b>Points</b>
Passport (current)	70
Citizenship Certificate	70
Birth Certificate	70
Certificate of Evidence of Resident Status	70
Australian Entry Visa	70
Driver's Licence	40
Marriage Certificate	40
Divorce Papers	40
Birth Certificate(s) of any of your child(ren)	40
Education Examination Certificates	40
Bank Card or Statements	40
Mortgage Papers	40
Certificate of Name Change	40
Rates Notices	20
Financial Papers (incl. share or superannuation statements)	10
Taxation Assessment Notice	10

<b>Non-Australian documents</b>	<b>Points</b>
Passport stamped with an entry into Australia	40
Identity Card	20
Other non-Australian documents that match the Australian documents listed above (for example, marriage certificate, birth certificate, driver's licence etc.)	20

**Note:** Only a maximum of 3 non-Australian documents (excluding a current passport) can be used.

**Your obligations**

Australian pension is paid subject to an income and assets test.

Most forms of income will affect the amount of Australian pension that you can be paid. The income test allows you to receive an amount of income before your Australian pension will be affected. You are required to tell us about all of the income that you receive and we will work out how it affects the amount of Australian pension that you can be paid.

The assets test allows you to have a certain level of assets before your Australian pension will be affected. As with income, you are required to tell us of all of your assets and we will tell you how they affect your Australian pension.

### The income test

How much payment you receive will depend on your circumstances and your (and/or your partner's) income and assets.

We calculate the amount that could be paid to you, and if applicable, to your partner, under both the income test and the assets test. The test giving the lower rate of payment is the one used to pay you and/or your partner.

Income includes money received from employment and money deemed to be earned from investments. It also includes money from outside Australia.

You can have income up to certain amounts before your payment is reduced.

#### **Your income may include:**

- deemed income from financial assets
- gross income from earnings
- income received to provide care
- net income from business, including farms
- family trust distributions or dividends from private company shares
- income attributable to the controllers of a private trust or private company
- income from rental property
- income from a life interest
- income from boarders and lodgers (other than immediate family)
- superannuation and pensions from countries other than Australia
- income from income stream products, superannuation pensions and annuities.

For more information about income, go to our website [servicessaustralia.gov.au/income](https://servicessaustralia.gov.au/income)

## The assets test

Most property and items you (and/or your partner) own or have interest in, including those assets held outside Australia, are taken into account when calculating your payment.

The value of your assets is what you would get for them if you sold them at market value.

Generally, any debt owing on an asset is deducted from the value of the asset.

### Your assets may include:

- rental properties, farms, second or holiday houses
- cars, caravans, boats or trailers
- home contents and personal effects, including antiques or other collectables
- the market or trade value of all savings and investments, including funeral bonds
- loans you have made to other people, family trusts and companies
- value of most income stream products
- business assets
- interest in a private trust or private company
- superannuation investments held by people over Age Pension age
- licenses, for example, fishing or taxi
- surrender value of life insurance policies, **and**
- any assets given away or sold for less than their market value within the last 5 years.

### The following assets are NOT included:

- your principal family home (and up to 2 hectares of privately used surrounding land that is on the same title), and any permanent fixtures such as wall-to-wall carpet and wall heaters
- some income stream products
- cemetery plots and pre-paid funeral expenses
- any property or monies left to you in an estate which you are not yet able to receive, generally for a period up to 12 months
- accommodation bonds paid to an aged care home or on entry to residential aged care
- aids for people with a disability
- monies received from the National Disability Insurance Scheme to provide for the needs of people with a disability
- most compensation or insurance payments for loss or damage to buildings or personal effects
- any life interest, reversionary interest, remainder interest or contingent interest unless it was created by you, your partner or at the time of death of your partner, **and**
- assets up to a certain limit held in a Special Disability Trust (SDT) for an immediate family member.

These are called exempt assets.

For more information about assets, go to our website [servicesaustralia.gov.au/assets](https://servicesaustralia.gov.au/assets)



## Changes you must tell us about

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As soon as you have lodged your claim for Australian pension, you must tell us **within 28 days** if any of these things happen or may happen. You can tell us by writing to us, by telephoning us direct (free of charge) on **1866 3433 086** or on **+61 3 6222 3455** or by facsimile on **+61 3 6222 2799**.

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- Income**
- if you and/or your partner start to receive a pension from a country, other than Australia, or you are already getting one and it increases (for example, annual reviews)
  - if you and/or your partner claim or receive compensation for work related accidents or illnesses
  - if you and/or your partner start work or recommence work, or start any form of profession, trade, business or self employment
  - if you and/or your partner receive a private pension or superannuation pension, or the private pension or superannuation pension you are already getting increases
  - if you and/or your partner start to receive rent, or the rent you are getting increases
  - if you and/or your partner's combined income from any source other than investments increases
  - if you and/or your partner buy or sell any shares or managed investments
  - if you and/or your partner receive any bonus shares.
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- Assets**
- if you and/or your partner's combined assets other than financial investments increase
  - if you and/or your partner's combined financial investments increase by more than AUD1,000
  - if you and/or your partner open any new accounts
  - if you and/or your partner give away assets or sell them for less than their value.
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- Other things you must tell us**
- if you marry; are in or commence a registered or de facto relationship; reconcile with a former partner; start living with someone as their partner
  - if you separate from your partner
  - if you divorce
  - if your partner dies
  - if you and/or your partner move into or out of a nursing home, hostel or retirement village
  - if you and/or your partner or any of your dependent children/students are charged with an offence and are in custody or remanded in a psychiatric institution or in jail
  - if you and/or your partner sell, rent out or dispose of the home you live in
  - if you and/or your partner leave your home for more than 12 months
  - if you change your address you should tell us straight away. If mail is returned to us because you are not at the last address you gave us, your payment may stop, or be rejected
  - if you are paid by direct deposit, you must advise us before you close or change your bank account
  - if you and/or your partner return to Australia, as your rate will probably change from the date you arrive
  - you must also tell us if you and/or your partner leave the country you live in, either permanently or temporarily, as your Australian pension may no longer be payable.

**Keep these Notes for claiming Australian Pension (PART 1), pages 1 to 9, for your future reference.**

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OFFICE USE ONLY

Date customer made a written request for a claim form.

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Date customer lodged this completed claim form with the US Social Security Administration Field Office.

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Stamp

2

## You

**1** Do you have a partner?

If your partner is now deceased, fill in 'Your partner' details at questions 5, 6, 7, 11, 12, 17, 18 and 22 ONLY.

- No  **Go to 4**  
 Yes  **Go to next question**

**2** Is your partner also claiming an Australian pension?

- No  You must still answer all the questions about them.  
 Yes  **Go to next question**

**3** Is your partner using this form or a separate form for a claim or to provide their details?

- This form   
 Separate form

**4** What type of payment do you wish to claim?

- Age Pension   
 Carer Payment   
 Disability Support Pension   
 Parenting Payment

**5** Your Centrelink Customer Reference Number (if known)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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## Your partner

If your partner is now deceased, fill in 'Your partner' details at questions 5, 6, 7, 11, 12, 17, 18 and 22 ONLY.

**4** What type of payment do you wish to claim?

- Age Pension  Not claiming   
 Carer Payment  at this time  
 Disability Support Pension   
 Parenting Payment

**5** Your Centrelink Customer Reference Number (if known)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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## You

6 Your name

Mr  Mrs  Ms  Miss  Other

Family name

First given name

Second given name

7 Your date of birth

Day  Month  Year



Provide an original document as proof of your date of birth.

8 Do you need an interpreter?

Available in international, Indigenous, Auslan and other sign languages.

No  **Go to 11**

Yes  **Go to next question**

9 What is your preferred spoken language?

10 What is your preferred written language?

## Your partner

6 Your name

Mr  Mrs  Ms  Miss  Other

Family name

First given name

Second given name

7 Your date of birth

Day  Month  Year



If you are claiming Age Pension or Disability Support Pension, provide an original document as proof of your date of birth.

8 Do you need an interpreter?

Available in international, Indigenous, Auslan and other sign languages.

No  **Go to 11**

Yes  **Go to next question**

9 What is your preferred spoken language?

10 What is your preferred written language?

**You**

**11** Have you been known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

**1** Other name



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Type of name (for example, name at birth)

**2** Other name



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Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

**12** Your gender

Male

Female

Other

**13** Your permanent address



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Country

**14** Your postal address (if different to above)



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Country

**Your partner**

**11** Have you been known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

**1** Other name



---



Type of name (for example, name at birth)

**2** Other name



---



Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

**12** Your gender

Male

Female

Other

**13** Your permanent address



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Country

**14** Your postal address (if different to above)



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Country

## You

### 15 Your contact details

It is important that you include the complete number (including country and area codes) as we may need to contact you on these numbers.

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the terms and conditions, go to our website [servicessaustralia.gov.au/em](http://servicessaustralia.gov.au/em)

#### Home phone number

Country ( ) Area code ( )

#### Mobile phone number

#### Alternative phone number

Country ( ) Area code ( )

#### Email

### 16 Are you currently receiving an Australian pension?

No  Go to next question

Yes  Give details below

What payment are you receiving?

Name payments are made in

▶ **Go to 18**

### 17 Have you claimed or received an Australian pension or benefit in the last 10 years?

No  Go to next question

Yes  Give details below

What payment did you last claim or receive?

Name claim was made in

## Your partner

### 15 Your contact details

It is important that you include the complete number (including country and area codes) as we may need to contact you on these numbers.

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the terms and conditions, go to our website [servicessaustralia.gov.au/em](http://servicessaustralia.gov.au/em)

#### Home phone number

Country ( ) Area code ( )

#### Mobile phone number

#### Alternative phone number

Country ( ) Area code ( )

#### Email

### 16 Are you currently receiving an Australian pension?

No  Go to next question

Yes  Give details below

What payment are you receiving?

Name payments are made in

▶ **Go to 18**

### 17 Have you claimed or received an Australian pension or benefit in the last 10 years?

No  Go to next question

Yes  Give details below

What payment did you last claim or receive?

Name claim was made in

**18** Tick **one** of the boxes below to tell us about your relationship status right now.

For more information about relationship status, read page 2 of the **Notes**.

If you have ever been separated from your current partner, give the date that you most recently got back together (reconciled) with your partner.

**Married**

Date married or last reconciled with your partner

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 19**

**Registered relationship**

(relationship registered under Australian state or territory law)

Date registered or last reconciled with your partner

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 19**

**De facto**

(your relationship is similar to a married couple but you are not married or in a registered relationship)

Date you started your relationship or last reconciled with your partner

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 19**

**Separated**

(previously in a marriage, registered or de facto relationship)

Date of last separation

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 23**

**Divorced**

Date of divorce

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 23**

**Widowed**

(previously in a marriage, registered or de facto relationship)

Date of partner's death

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Go to 22**

**Never married or lived with a partner**

**Go to 26**

**19** Do you live in the same home as your partner?

No  ▶ **Go to next question**

Yes  ▶ **Go to 24**

**20** Why are you not living with your partner?

Partner's illness

Your illness

Partner in prison

Partner's employment

Other  ▶ Give details below

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**21** Period not living with your partner.

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

To 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

**OR** indefinite  ▶ **Go to 24**

**22** Give details about your deceased partner.

Country where partner died

<input type="text"/>
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▶ **Go to 26**

**23** Give details about your former partner.

Full name

<input type="text"/>
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Date of birth

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Current address (if known)

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Country

▶ **Go to 26**

**24** Do you give your partner permission to make enquiries on your behalf with Services Australia?

You can change this authority at any time.

No

Yes

**25** Does your partner give permission for you to make enquiries on their behalf with Services Australia?

No

Yes

26 Do you live with anyone else, other than members of your family?

No

Yes

### Dependent children

27 Do you (and/or your partner) have any dependent children or students?

A dependent child is a young person under age 16 or a full-time student under age 22 who is in your care and has limited income. A young person cannot be dependent if they are not studying full-time or are earning income. To get Parenting Payment you must have a dependent child under the age of 14.

No  Go to next question

Yes  Give details below

#### AND



If any child is in full-time study, you should provide a statement from the educational institution confirming their enrolment.

### Child 1

Family name

First given name

Second given name

Has this child ever been known by any other name(s)?

No

Yes  List the other names

Gender Male  Female  Other

Date of birth Day   Month   Year

Is the child in full-time study? No  Yes

Does the child live with you? No  Yes

Has the child lived in Australia with you OR been an Australian resident? No  Yes

27 Continued

### Child 2

Family name

First given name

Second given name

Has this child ever been known by any other name(s)?

No

Yes  List the other names

Gender Male  Female  Other

Date of birth Day   Month   Year

Is the child in full-time study? No  Yes

Does the child live with you? No  Yes

Has the child lived in Australia with you OR been an Australian resident? No  Yes

If you need more space, provide a separate sheet with details.



## Residence details

Read this before answering the following questions.



To claim an Australian pension, a period of Australian residence must be proved.

You must have lived in Australia on a long-term basis with a permanent residence visa or as an Australian citizen. Holidays in Australia are not included. Holidays or short trips outside Australia while you were living in Australia are included as part of your residence in Australia.

A list of suitable documents is shown in **PART 1** for proof of identity and proof of residence in Australia. If you have no documents to confirm your residence in Australia a benefit may not be granted.

Provide with your claim certified copies of any documents which verify your residence in Australia.

### You

28 What is your country of birth?

29 What are your countries of citizenship or nationality?

Australia  Date of grant

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Other  List all other countries where you have citizenship or nationality.

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30 Give details of all countries (including Australia) where you have lived since birth.

'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

1 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

2 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

3 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

If you need more space, provide a separate sheet with details.

### Your partner

28 What is your country of birth?

29 What are your countries of citizenship or nationality?

Australia  Date of grant

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Other  List all other countries where you have citizenship or nationality.

---

30 Give details of all countries (including Australia) where you have lived since birth.

'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

1 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

2 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

3 Country

From 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

If you need more space, provide a separate sheet with details.

**You**

**31** For each of the arrivals in, and departures from Australia identified at Question 30, provide the following details.

Be as accurate as possible, even if you can only remember the year you first arrived in Australia.

**1**

	Day	Month	Year
Arrival date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of arrival

Visa details on arrival

Visa subclass	Date visa granted						
<input type="text"/>	<table border="0"> <tr> <td style="text-align: center;">Day</td> <td style="text-align: center;">Month</td> <td style="text-align: center;">Year</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Day	Month	Year	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year					
<input type="text"/>	<input type="text"/>	<input type="text"/>					

	Day	Month	Year
Departure date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of departure

**2**

	Day	Month	Year
Arrival date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of arrival

Visa details on arrival

Visa subclass	Date visa granted						
<input type="text"/>	<table border="0"> <tr> <td style="text-align: center;">Day</td> <td style="text-align: center;">Month</td> <td style="text-align: center;">Year</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Day	Month	Year	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year					
<input type="text"/>	<input type="text"/>	<input type="text"/>					

	Day	Month	Year
Departure date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of departure

If you need more space, provide a separate sheet with details.

**Your partner**

**31** For each of the arrivals in, and departures from Australia identified at Question 30, provide the following details.

Be as accurate as possible, even if you can only remember the year you first arrived in Australia.

**1**

	Day	Month	Year
Arrival date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of arrival

Visa details on arrival

Visa subclass	Date visa granted						
<input type="text"/>	<table border="0"> <tr> <td style="text-align: center;">Day</td> <td style="text-align: center;">Month</td> <td style="text-align: center;">Year</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Day	Month	Year	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year					
<input type="text"/>	<input type="text"/>	<input type="text"/>					

	Day	Month	Year
Departure date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of departure

**2**

	Day	Month	Year
Arrival date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of arrival

Visa details on arrival

Visa subclass	Date visa granted						
<input type="text"/>	<table border="0"> <tr> <td style="text-align: center;">Day</td> <td style="text-align: center;">Month</td> <td style="text-align: center;">Year</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Day	Month	Year	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year					
<input type="text"/>	<input type="text"/>	<input type="text"/>					

	Day	Month	Year
Departure date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of ship or airline

Place of departure

If you need more space, provide a separate sheet with details.

## You

- 32** If we are not able to verify your Australian residence we will need to contact people who knew you in Australia.

Give the names, addresses and telephone numbers of 3 people, not related to you, who are currently living in Australia and can confirm your residence in Australia.

**1** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

**2** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

**3** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

## Your partner

- 32** If we are not able to verify your Australian residence we will need to contact people who knew you in Australia.

Give the names, addresses and telephone numbers of 3 people, not related to you, who are currently living in Australia and can confirm your residence in Australia.

**1** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

**2** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

**3** Full name

Address

---

---

Postcode  
Zip

Contact phone number

Area code (    )

## Bank account details

**33 Read** this before answering the following question.

If you are granted an Australian pension, your payment will be issued in local currency to your bank account in the USA every 4 weeks. Note that payments may be subject to fees levied by your bank, and such fees must be paid by you.

You will need to provide details of a bank account that is capable of receiving direct deposit payments before you can receive any payments.



Provide a copy of a bank statement or other document that shows your bank details including your account details and the name(s) of the account holder(s).

### You

Name of bank – Write the full name of your bank or other financial institution.

Name of bank branch – Write the full name of your bank or other financial institution branch.

Address of bank branch  
Number/Street

Town/City/ZIP/Postcode

Country

USA

Bank Sort Code/Routing Code – Sort/routing code for the branch of your bank or financial institution.

**Note:** this is not the SWIFT or Bank Identifier Code (BIC).

Federal Reserve  
routing address (4)

Federal Reserve ABA  
Institution ID (4)

Check  
digit (1)

Account number

Account type: Demand  Savings

Name of account holder – Write the exact name(s) in which your account is held.

### Your partner

Name of bank – Write the full name of your bank or other financial institution.

Name of bank branch – Write the full name of your bank or other financial institution branch.

Address of bank branch  
Number/Street

Town/City/ZIP/Postcode

Country

USA

Bank Sort Code/Routing Code – Sort/routing code for the branch of your bank or financial institution.

**Note:** this is not the SWIFT or Bank Identifier Code (BIC).

Federal Reserve  
routing address (4)

Federal Reserve ABA  
Institution ID (4)

Check  
digit (1)

Account number

Account type: Demand  Savings

Name of account holder – Write the exact name(s) in which your account is held.

## Accommodation

34 Which of the following best describes where you live?

In a home you (and/or your partner) own. This includes paying it off (mortgage).  **Go to 35**

In a place where you (and/or your partner) pay private rent or board and lodging.  **Go to 49**

In a retirement village.  **Go to 39**

In accommodation which you (and/or your partner) have the right to use for life, (for example, a granny flat).  **Go to 41**

In a residential aged care home (nursing home or hostel) which provides nursing care.  **Go to 42**

Other (give details below).  **Go to 49**


## Your principal home

35 Is the home on a block of land larger than 2 hectares (5 acres)?

No  **Go to next question**

Yes



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)

36 Does the property that you (and/or your partner) live on have more than one title document?

No  **Go to next question**

Yes



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)

37 Is any part of the home property used for income producing purposes?

**Do not include** rent from boarders or lodgers.

No  **Go to next question**

Yes



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)

38 Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia?

No  **Go to 49**

Yes  How many other properties in and/or outside Australia do you (and/or your partner) own or have an interest in?

--



You will need to complete and return a **Real estate details (Mod R)** form for each property. If you do not have this form, go to our website [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)  
**Go to 49**

## Retirement village

- 39 Did you pay an entry contribution for your accommodation in the retirement village?

No  ► *Go to next question*

Yes  ► Give details below

How much?

Currency

- 40 Do you still own your former home?

No  ► *Go to 49*

Yes  ►



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms) ► *Go to 49*

## Life interest

- 41 Did you pay a sum of money and/or transfer any assets to another person in return for this accommodation for life?

No  ► *Go to 49*

Yes  ► Give details below

Name of person or organisation

Address

---

---

Country

Date paid/transferred

Day

Month

Year

Amount paid

Currency

### AND/OR

What assets were transferred?

Market value of assets transferred

Currency

► *Go to 49*

## Residential aged care home

(nursing home or hostel) which provides nursing care

- 42 On what date did you move into your accommodation in the nursing home or hostel?

Day

Month

Year

- 43 Do you still own your former home?

No  ► *Go to 49*

Yes  ► *Go to next question*

- 44 Do you have a partner?

No  ► *Go to 48*

Yes  ► *Go to next question*

- 45 Does your partner still live in your former home?

No  ► *Go to next question*

Yes  ► *Go to 49*

- 46 What date did your partner leave your former home?

Day

Month

Year

- 47 Did your partner leave your former home more than 2 years ago?

No  ► *Go to 49*

Yes  ►



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms) ► *Go to 49*

- 48 Did you leave your former home more than 2 years ago?

No  ► *Go to next question*

Yes  ►



You will need to complete and return a **Real estate details (Mod R)** form. If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**Pension-type payments from outside Australia**

**49** Do you (and/or your partner) receive any pension, benefit, allowance or similar payment from outside Australia?

**Includes:**

- payments for retirement or old age
- payments for disability or invalidity
- payments for widowhood or survivorship
- payments for children
- superannuation payments
- payments for war injury
- payments for war service
- payments as a war widow
- war restitution payments
- other pensions, benefits or allowances from outside Australia.

No  Go to next question

Yes  Give details below

**AND**



Provide the most recent document showing payment details for each of the pensions, benefits or allowances paid (for example, pension certificate).

**1** Type of payment

Paid in name of

Authority paying it

Country paying it

Reference number

Amount of payment before deductions

Currency of payment

How often paid?

Received by:

You  Your partner

**49** Continued

**2** Type of payment

Paid in name of

Authority paying it

Country paying it

Reference number

Amount of payment before deductions

Currency of payment

How often paid?

Received by:

You  Your partner

If you need more space, provide a separate sheet with details.

**50** Will you (and/or your partner) be claiming any pension, benefit, allowance, superannuation, compensation or similar payment in the next 12 months?

No  Go to next question

Yes  Give details below

**1** Type of payment

Country claiming from

When are you going to claim?

Day  | Month  | Year

Who is claiming this payment?

You  Your partner

**2** Type of payment

Country claiming from

When are you going to claim?

Day  | Month  | Year

Who is claiming this payment?

You  Your partner

If you need more space, provide a separate sheet with details.

## Employment income

- 51** Are you (and/or your partner) currently paid or expecting to be paid any income from work other than self-employment?

**Include** all income before tax and other deductions from:


- wages
- salaries
- bonuses
- additional payments

**Do not include** self-employment or business income. This will be asked later in the form.

No  **Go to 53**

Yes  Give details below

**AND**

 Provide a copy of your most recent payslip(s).

### 1 Person working for this employer

You  Your partner

Name of employer

Address of employer

---

---

Country

Job description

Workplace (if different from your employer's address)

Is this work:

Full-time  Part-time  Seasonal  Casual

Hours worked  per fortnight

Gross amount paid per fortnight, before tax and other deductions  per fortnight

Currency

Do you plan to stop working soon?

No  Yes  Date you plan to stop working

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 51 Continued

### 2 Person working for this employer

You  Your partner

Name of employer

Address of employer

---

---

Country

Job description

Workplace (if different from your employer's address)

Is this work:

Full-time  Part-time  Seasonal  Casual

Hours worked  per fortnight

Gross amount paid per fortnight, before tax and other deductions  per fortnight

Currency

Do you plan to stop working soon?

No  Yes  Date you plan to stop working


Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

If you need more space, provide a separate sheet with details.

- 52** Do you (and/or your partner) receive a fringe benefit provided by this employer?

**Fringe benefit** means a benefit you receive as part of your employment income but not as a wage or salary (for example, use of a car as part of a salary package).

No  **Go to next question**

Yes   Provide documents which indicate the type of fringe benefit and its value.




**53** In the last 12 months, have you (and/or your partner) stopped working for any employers (including self-employment)?

No  **Go to 56**

Yes  Give details below

**AND**

 Provide details which confirm you have stopped working for an employer (for example, letter from employer).

**1** Name of employer

Address of employer


---


---

Country

Who stopped this work? You  Your partner

Day Month Year

Date last worked

--	--	--

Date last paid

Day Month Year

--	--	--

**2** Name of employer

Address of employer


---


---

Country

Who stopped this work? You  Your partner

Day Month Year

Date last worked

--	--	--

Date last paid

Day Month Year


--	--	--

If you need more space, provide a separate sheet with details.

**54** Have you (and/or your partner) received any redundancy payments, in the last 2 years?

No  **Go to next question**


Yes

 Provide details which confirm the redundancy payment (for example, letter from employer).

**55** In the last 12 months, have you (and/or your partner) received any leave entitlement payments?

No  **Go to next question**

Yes

 Provide details which confirm the leave entitlement payments (for example, letter from employer).

### Household contents

**56** Read this before answering the following question.

**Market value** is what you would get if you sold your household contents and personal effects. It is not the replacement or insured value.

**Household contents include:**

- all normal furniture such as soft furnishings (for example, curtains)
- electrical appliances (other than fixtures such as stoves and built-in items)
- antiques and works of art.

**Personal effects include:**

- jewellery for personal use
- hobby collections (for example, stamps, coins).

What is your estimate of the net market value of your (and your partner's) normal household contents and personal effects?

Amount

Currency

## Life insurance policies

- 57** Do you (and/or your partner) have any life insurance policies that can be cashed in?

**Do NOT include** details of life office or friendly society insurance bonds in this question. You will be asked about these in a later question.

No  Go to next question

Yes  Give details below

**AND**

 Provide the policy document and the latest statement for each policy listed below.

**1** Name of insurance company

<input type="text"/>	
Policy number	Surrender value
<input type="text"/>	<input type="text"/>
Currency	Owned by:
<input type="text"/>	You <input type="checkbox"/> Your partner <input type="checkbox"/>


**2** Name of insurance company

<input type="text"/>	
Policy number	Surrender value
<input type="text"/>	<input type="text"/>
Currency	Owned by:
<input type="text"/>	You <input type="checkbox"/> Your partner <input type="checkbox"/>

If you need more space, provide a separate sheet with details.

- 58** Do you (and/or your partner) receive payments from an income protection policy?

No  Go to next question

Yes   Provide the policy document and the latest statement for this policy.

- 59** Do you (and/or your partner) have any funeral bonds/ funeral investments, including a prepaid funeral?

\* APIR is a commonly used code for fund managers in Australia to identify individual financial products.

No  Go to next question

Yes  Give details below

**1** Name of company

<input type="text"/>	
Name of product	
<input type="text"/>	
APIR* code (if known)	Purchase price including instalments but not interest
<input type="text"/>	<input type="text"/>
Current value	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

**2** Name of company

<input type="text"/>	
Name of product	
<input type="text"/>	
APIR* code (if known)	Purchase price including instalments but not interest
<input type="text"/>	<input type="text"/>
Current value	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

- 60** Have you (and/or your partner) a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No  Go to next question

Yes   Provide a copy of each contract.

## Vehicles

- 61** Do you (and/or your partner) own any motor vehicles, boats, caravans or trailers?

**Do NOT include** a vehicle, boat, caravan or trailer in which you live.

No  ► Go to next question

Yes  ► Give details below

<b>1</b> Make (for example, Toyota)	Model (for example, Corolla)
<input type="text"/>	<input type="text"/>
Year <input type="text"/>	Market value <input type="text"/>
Amount owing <input type="text"/>	Currency <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b> Make (for example, Toyota)	Model (for example, Corolla)
<input type="text"/>	<input type="text"/>
Year <input type="text"/>	Market value <input type="text"/>
Amount owing <input type="text"/>	Currency <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

## Bank accounts

- 62** Give details of **all** your (and/or your partner's) bank accounts, including term deposits, joint accounts and accounts you hold under any other name inside and outside Australia.

Include details of account nominated at question 33.

<b>1</b> Name of institution <input type="text"/>	
Type of account (for example, savings, cheque) <input type="text"/>	
Account number <input type="text"/>	
Account balance <input type="text"/>	Currency <input type="text"/>
Name of account holder(s) <input type="text"/>	

<b>2</b> Name of institution <input type="text"/>	
Type of account (for example, savings, cheque) <input type="text"/>	
Account number <input type="text"/>	
Account balance <input type="text"/>	Currency <input type="text"/>
Name of account holder(s) <input type="text"/>	

**3** Name of institution

Type of account (for example, savings, cheque)

Account number

Account balance      Currency  
     

Name of account holder(s)  
  
 .....

**4** Name of institution

Type of account (for example, savings, cheque)

Account number

Account balance      Currency  
     

Name of account holder(s)  
  
 .....

If you need more space, provide a separate sheet with details.

**Bonds and debentures**

**63** Do you (and/or your partner) have any bonds or debentures?

**Include** investments inside and outside Australia.  
**Do NOT include** friendly society bonds or life insurance bonds. You will be asked about these in a later question.

No  ➤ Go to next question

Yes  ➤ Give details below

**AND**

 Provide the latest statement for each investment listed below.

**1** Type of investment

Name of company

Current amount invested      Currency  
     

Your share  %      Partner's share  %

**2** Type of investment

Name of company

Current amount invested      Currency  
     

Your share  %      Partner's share  %

If you need more space, provide a separate sheet with details.

## Money on loan

**64** Do you (and/or your partner) have money on loan to another person or organisation?

**Include** all loans, whether they are made to family members, other people or organisations or trusts.

No  Go to next question

Yes  Give details below

**AND**

 Provide a document which gives details for each loan (if available).

**1** Who did you lend the money to?

Date lent Amount lent

Day Month Year

--	--	--	--

Current balance of loan Currency

--	--

Lent by you  % Lent by your partner  %

**2** Who did you lend the money to?

Date lent Amount lent

Day Month Year

--	--	--	--

Current balance of loan Currency

--	--

Lent by you  % Lent by your partner  %

If you need more space, provide a separate sheet with details.

## Shares

**65** Do you (and/or your partner) own any shares, options, rights, convertible notes, warrants or other securities **LISTED** on an Australian Stock Exchange (for example, ASX, NSX, APX or Chi-X)\* or a stock exchange outside Australia?

**Include** shares traded in exempt stock markets.

**Do NOT include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

**AND**

 Provide the latest statement(s) detailing your share holding for each share listed below.

**1** Name of company

Type of share/investment (for example, ordinary share)

ASX\* code (if known) Current market value  
(if share is NOT listed on  
the ASX\*)

--	--

Country (if share is NOT listed on the ASX\*) Number of shares or other securities

--	--

Your share  % Partner's share  %

**2** Name of company

Type of share/investment (for example, ordinary share)

ASX\* code (if known) Current market value  
(if share is NOT listed on  
the ASX\*)

--	--

Country (if share is NOT listed on the ASX\*) Number of shares or other securities

--	--

Your share  % Partner's share  %

If you need more space, provide a separate sheet with details.

**66** Do you (and/or your partner) own any shares, options or rights, issued in a PUBLIC company NOT listed on any stock exchange inside or outside Australia?

**Include** shares traded in exempt stock markets.

**Do NOT include:**

- managed investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

**AND**

 Provide the latest statement(s) detailing your share holding for each share listed below.

**1** Name of company

Type of shares  Number of shares

Current market value  Currency

Your share  % Partner's share  %

**2** Name of company

Type of shares  Number of shares

Current market value  Currency

Your share  % Partner's share  %

If you need more space, provide a separate sheet with details.

## Managed investments and superannuation

**67** Do you (and/or your partner) have any managed investments, inside or outside Australia?

**Include** investment trusts, personal investment plans, life office and friendly society bonds.

**Do NOT include:**

- life insurance policies or superannuation and rollover investments
- investments purchased with a margin loan.

No  Go to next question

Yes  Give details below

**AND**

 Provide documents which show details for each investment listed below.

**1** Name of company

Name of product (for example, investment trust)

Type of product/option (for example, balanced, growth)

APIR\* code (if known)  Number (if applicable)

Current market value of investment  Currency

Your share  % Partner's share  %

**2** Name of company

Name of product (for example, investment trust)

Type of product/option (for example, balanced, growth)

APIR\* code (if known)  Number (if applicable)

Current market value of investment  Currency

Your share  % Partner's share  %


If you need more space, provide a separate sheet with details.

**68** Do you (and/or your partner) own any managed investments or securities purchased with a margin loan?

No  Go to next question

Yes  Give details below

**AND**

 Provide the latest statement detailing your margin loan(s) for each investment.

**1** Name of margin loan company

Current portfolio      APIR\* code (if known)

Current margin loan balance      Your share      Partner's share

       %       %

**2** Name of margin loan company

Current portfolio      APIR\* code (if known)

Current margin loan balance      Your share      Partner's share

       %       %

If you need more space, provide a separate sheet with details.

**69** In the last 12 months, have you (and/or your partner) borrowed an amount which is secured against your home?

**Include:**

- Home Equity Conversion Loan
- Reverse Equity Mortgage.


**Do NOT include:**

- a mortgage taken out to purchase your home.

No  Go to next question

Yes  Give details below

**AND**

 Provide a copy of the loan agreement or contract.

Name of the organisation agreement entered into with

Address of the organisation

---

---

---

Country

Entered into by:      You       Your partner

If you need more space, provide a separate sheet with details.

**70** Read this before answering the following question.

**YOU** should answer this question **ONLY** if you (and/or your partner) are Age Pension age or claiming Age Pension.

Do you (and/or your partner) have any money invested in Australian superannuation where the fund is still in accumulation phase and not paying a pension?

**Include:**

- superannuation funds such as retail, industry, corporate or employer and public sector
- retirement savings accounts
- any money held in a Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

No  Go to next question

Yes  Give details below

**AND**

 Provide the latest statement for each superannuation investment. If you have a SMSF or SAF, provide the financial returns and member statement for the fund.

**1** Name of institution/fund manager

Name of fund

Product reference number      Current market value

Date of joining/investment      Currency

Day	Month	Year	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Owned by:      You       Your partner

**2** Name of institution/fund manager

Name of fund

Product reference number      Current market value

Date of joining/investment      Currency

Day	Month	Year	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Owned by:      You       Your partner

If you need more space, provide a separate sheet with details.

**Income stream products**

**71** Read this before answering the following question.

An **income stream** is a regular series of payments which may be made for a lifetime or fixed period by a financial institution or employer subject to Australian prudential regulations.

Where the income stream is from a country other than Australia it will be assessed differently than if it were from a source inside Australia.

**An income stream may be payable by:**

- a financial institution
- a retirement savings account
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF).

**Types of income streams include:**


- account-based pension (also known as allocated pension)
- market-linked pension (also known as term allocated pension)
- annuities
- defined benefit pension (for example, ComSuper pension, State Super pension)
- superannuation pension (non-defined benefit).

Do you (and/or your partner) receive income from any income stream products?

No  Go to next question

Yes  Give details below

**AND**

 You (and/or your partner) will need to return a **Details of income stream product (SA330)** form or a similar schedule, for each Australian income stream product. The form or similar schedule must be completed by your product provider or the trustee of the Self Managed Superannuation Fund (SMSF) or Small APRA Fund (SAF) or the SMSF administrator.

If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

Name of product provider/SMSF/SAF

Type of income stream

Product reference number      Commencement date

	Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Owned by:      You       Your partner

If you need more space, provide a separate sheet with details.



## Other investments

- 72** Do you (and/or your partner) have any money invested in, or do you receive income from, any other investments not declared elsewhere on this form?

**Include** all investments inside and outside Australia not declared elsewhere on this form.

**Do NOT include** private trusts, private companies or businesses. You will be asked about these in later questions.

No  Go to next question

Yes  Give details below

**AND**

 Provide documents which show details for each investment listed below.

Name of investment

Name of organisation/company

Current value of investment

Income received in last 12 months

Currency

Your share

 %

Partner's share

 %

If you need more space, provide a separate sheet with details.

## Gifting

- 73** In the last 5 years, have you (and/or your partner) given away, sold for less than their value, or surrendered a right to, any cash, assets, property or income?

**Include** forgiven loans and shares in private companies.

No  Go to next question

Yes  Give details below

What you gave away or sold for less than its value (for example, money, car, second home, land, farm)

Date given or sold

What it was worth

Day Month Year

Amount you received for the item

Currency

Gift made by

Your share

 %

Partner's share

 %

Was this gift to a Special Disability Trust (SDT)?

No

Yes

If you need more space, provide a separate sheet with details.

## Money from boarders and lodgers

**74** Do you (and/or your partner) receive money from any boarders or lodgers living with you?

**Include** boarders or lodgers who live with you or in accommodation at the property you live in (for example, granny flat).

**Do NOT include** family members (for example, son, daughter, parent).

No  Go to next question

Yes  Give details below

**1** Name of boarder or lodger

Relationship to you (for example, friend, cousin)

Number of meals you provide each day

Amount paid for board or lodging

 each day

Currency of payment

How often paid

Date boarder or lodger started paying

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

**2** Name of boarder or lodger

Relationship to you (for example, friend, cousin)

Number of meals you provide each day

Amount paid for board or lodging

 each day

Currency of payment

How often paid

Date boarder or lodger started paying

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

If you need more space, provide a separate sheet with details.

## Australian Government Payments


**75** Do you (and/or your partner) receive payments from Australian Government sources other than Centrelink income support payments?

For example, an Australian Service or Veterans payment.

No  Go to next question

Yes  Give details below

**AND**

 Provide a letter or other document(s) that shows the reference number and details for each payment (other than payments made by us).

**1** Type of payment

Who pays it

Reference number (if known)

Date commenced (if known)

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Paid to:

You

Your partner

**2** Type of payment

Who pays it

Reference number (if known)

Date commenced (if known)

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Paid to:

You

Your partner

If you need more space, provide a separate sheet with details.

## Lump sum payment

**76** In the last 12 months, have you (and/or your partner) received a lump sum payment that is not declared elsewhere on this form?

**Do NOT include** compensation, insurance or damages lump sum payments. You will be asked about these in a later question.

No  Go to next question

Yes  Give details below

### 1 Type of lump sum

Amount paid

Currency of payment



Date paid

Payment received by:

Day Month Year




You  Your partner

### 2 Type of lump sum

Amount paid

Currency of payment



Date paid

Payment received by:

Day Month Year




You  Your partner

### 3 Type of lump sum

Amount paid

Currency of payment



Date paid

Payment received by:

Day Month Year




You  Your partner

If you need more space, provide a separate sheet with details.

## Other payments

**77** Do you (and/or your partner) receive any income from other sources, not previously mentioned on this form?

**Include** income from:

- gratuities
- other government departments (for example, study allowance, War Widow's/Service Pension)
- match or sporting payments
- other payments made from inside or outside Australia
- any other income you have not included elsewhere on this form.


**Note:** Income includes any payment in kind, such as non-monetary payments for services.

**Do NOT include** compensation or damages payments. You will be asked about this in a later question.

No  Go to next question

Yes  Give details below

### AND

 Provide documents which show details of other payments (for example, statement from other Government departments).

### 1 Type of payment

Who pays it

Amount received before tax and other deductions

Currency



How often paid

If part of amount is for children – how much



Paid to:

You  Your partner

### 2 Type of payment

Who pays it

Amount received before tax and other deductions

Currency



How often paid

If part of amount is for children – how much



Paid to:

You  Your partner

If you need more space, provide a separate sheet with details.

## Cash holdings

**78** Do you (and/or your partner) have any cash holdings?

**Include** notes and coins you have in a safety deposit box, or you are holding instead of putting it into a bank account, or someone else is looking after for you.

**Do NOT include** cash you have for shopping and other day to day expenses.

No  Go to next question

Yes  Give details below

Total amount	Currency
<input type="text"/>	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

## Compensation

**79** Are you (and/or your partner) receiving or entitled to claim an insurance payout, damages, or compensation (if made wholly or partly in respect of lost earnings or lost capacity to earn resulting from personal injury)?

No  Go to next question

Yes

 You will need to complete and return a **Compensation and damages (Mod C)** form.  
If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

## Private trust/private company/business

**80** Are, or have you (and/or your partner), been involved in a private trust?

You may be, or have been:

- a trustee
- an appointor
- a beneficiary

or have:

- made a loan to a private trust
- made a gift of cash, assets, or private property to a private trust in the last 5 years
- relinquished control of a private trust in the last 5 years
- a private annuity
- a life interest
- an interest in a deceased estate.

No  Go to next question

Yes

 You will need to complete and return a **Private Trust (Mod PT)** form.  
If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**81** Are, or have you (and/or your partner), been involved in a private company?

You may be, or have been:

- a director
- a shareholder

or have:

- made a loan to a private company
- transferred shares in a private company in the last 5 years
- made a gift of cash, assets or property to a private company in the last 5 years.

No  Go to next question

Yes

 You will need to complete and return a **Private Company (Mod PC)** form.  
If you do not have this form, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)


**82** Are you (and/or your partner) involved in any type of business?

**Include:**

- farming
- self-employed
- sole trader
- partnership
- sub-contractor.

No  Go to next question

Yes

 You will need to complete and return a **Business details (Mod F)** form. If the business owns real estate you will also need to complete and return a **Real estate details (Mod R)** form for each property.  
If you do not have these forms, go to our website [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**Other assets**

**83** Do you (and/or your partner) own or partly own any other assets not previously mentioned on this form?

**Include** assets inside or outside Australia.

No  *Go to next question*

Yes  Give details below

*Continued* ▶

**1** Description of asset

Current market value

Currency

Asset owned by      You       Your partner

**2** Description of asset

Current market value

Currency

Asset owned by      You       Your partner

**3** Description of asset

Current market value

Currency

Asset owned by      You       Your partner

If you need more space, provide a separate sheet with details.

## Person permitted to enquire

84 Read this before answering the following question.

Completing this section allows a person to make enquires ONLY, not to change your personal details or receive payments from Services Australia. If you wish a person to receive payments or change your personal details on your behalf, you will have to complete an **Authorising a person or organisation to enquire or act on your behalf (AUS221)** form. This form can be downloaded from [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms) or contact Services Australia.

### You

Do you wish to nominate a person other than your partner to make enquiries on your behalf with Services Australia?

- You do not have to nominate a person to enquire.
- The person you nominate to enquire on your behalf can be living in Australia.
- You can change this arrangement at any time.

No  Go to next question

Yes  Give details below

Person's full name

Person's date of birth

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Person's relationship to you

Person's address

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Country

Person's contact phone number

Country ( ) Area code ( )

Person's email

Person's preferred language when dealing with Services Australia

Period of authorisation

Indefinite  Go to next question

Set period  Give details below

From

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

To

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Your partner

Do you wish to nominate a person other than your partner to make enquiries on your behalf with Services Australia?

- You do not have to nominate a person to enquire.
- The person you nominate to enquire on your behalf can be living in Australia.
- You can change this arrangement at any time.

No  Go to next question

Yes  Give details below

Person's full name

Person's date of birth

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Person's relationship to you

Person's address

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Country

Person's contact phone number

Country ( ) Area code ( )

Person's email

Person's preferred language when dealing with Services Australia

Period of authorisation

Indefinite  Go to next question

Set period  Give details below

From

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

To

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Other information

**85** Are you (and/or your partner) claiming Age Pension or Disability Support Pension?

No  **Go to 87**

Yes  **Go to next question**

**86** **Read** this before answering the following question.

Age Pension (blind) or Disability Support Pension (blind) may be paid if you are legally blind. For our purposes this means that your visual acuity:

- after correction by suitable lenses, is less than 6/60 on the Snellen Scale in both eyes, OR
- has a field of vision constricted to 10 degrees or less of arc around central fixation in the better eye irrespective of corrected visual acuity (equivalent to 1/100 white test object), OR
- has a combination of visual defects resulting in the same degree of visual impairment as that occurring in the above points.

Age Pension (blind) or Disability Support Pension (blind) may be paid at a higher rate than Age Pension or Disability Support Pension, depending on your circumstances.

Do you (and/or your partner) meet the definition of legal blindness as stated above?

No  **Go to next question**

Yes



Provide an ophthalmologist report confirming that you (and/or your partner) meet the Australian definition of legal blindness as stated above.

## Checklist

**87** Use this checklist to remind you which documents you must provide.  
If you are not sure, check the question to see if you need to provide the documents.

Where you are asked to supply original documents, supply only original documents.

In some circumstances, copies of documents may be accepted, as detailed in the below checklist.

	Your partner	
	You	partner
Certified copies of proof of birth (as required for you at <b>question 7</b> ) (as required for your partner, if they are claiming Age Pension or Disability Support Pension, at <b>question 7</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Statement from educational institution confirming child is in full-time study (if you answered Yes at <b>question 27</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Certified copies of proof of residence in Australia	<input type="checkbox"/>	<input type="checkbox"/>
Bank account details for payments (as required at <b>question 33</b> )	<input type="checkbox"/>	<input type="checkbox"/>
A <b>Real estate details (Mod R)</b> form (If you answered Yes at <b>question 35, 36, 37, 38, 40, 47, 48</b> or <b>82</b> )	<input type="checkbox"/>	<input type="checkbox"/>
The most recent document showing payment details for each of the pensions, benefits or allowances paid (for example, pension certificate) (If you answered Yes at <b>question 49</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Most recent payslip(s) (If you answered Yes at <b>question 51</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of fringe benefits (If you answered Yes at <b>question 52</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which confirm you have stopped working for an employer (If you answered Yes at <b>question 53</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of redundancy payments (If you answered Yes at <b>question 54</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of leave entitlement payments (If you answered Yes at <b>question 55</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest insurance policy documents and latest statements (If you answered Yes at <b>question 57</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Income protection policy documents and latest statements (If you answered Yes at <b>question 58</b> )	<input type="checkbox"/>	<input type="checkbox"/>

	Your You partner	Your partner
Copy of contract (If you answered Yes at <b>question 60</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for bonds and debentures (If you answered Yes at <b>question 63</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Loan contract and latest statements (If you answered Yes at <b>question 64</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for shares LISTED on a stock exchange (If you answered Yes at <b>question 65</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for shares NOT listed on a stock exchange (If you answered Yes at <b>question 66</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of managed investments (If you answered Yes at <b>question 67</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest statement for margin loans for each investment (If you answered Yes at <b>question 68</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Copy of the loan agreement or contract (If you answered Yes at <b>question 69</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest statements for approved deposit funds, deferred annuities, rollover funds and superannuation funds, tax returns and member's statements for SMSF and SAF funds (If you answered Yes at <b>question 70</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Latest schedules for income stream products or a <b>Details of income stream product (SA330)</b> form (If you answered Yes at <b>question 71</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of other investments (If you answered Yes at <b>question 72</b> )	<input type="checkbox"/>	<input type="checkbox"/>
A letter or other document(s) that shows the reference number and details for each payment (other than payments made by us) (If you answered Yes at <b>question 75</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Documents which show details of other payments (for example, statement from other government departments) (If you answered Yes at <b>question 77</b> )	<input type="checkbox"/>	<input type="checkbox"/>
<b>Compensation and damages (Mod C)</b> form (If you answered Yes at <b>question 79</b> )	<input type="checkbox"/>	<input type="checkbox"/>
<b>Private Trust (Mod PT)</b> form (If you answered Yes at <b>question 80</b> )	<input type="checkbox"/>	<input type="checkbox"/>
<b>Private Company (Mod PC)</b> form (If you answered Yes at <b>question 81</b> )	<input type="checkbox"/>	<input type="checkbox"/>

	Your You partner	Your partner
<b>Business details (Mod F)</b> form (If you answered Yes at <b>question 82</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Ophthalmologist report (If you answered Yes at <b>question 86</b> )	<input type="checkbox"/>	<input type="checkbox"/>

*Continued* ►



## Privacy notice

### 88 You (and your partner) need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicessaustralia.gov.au/privacypolicy](https://servicessaustralia.gov.au/privacypolicy)

## Declaration

### 89 Declaration

#### I declare that:

- I have read and I understand the 'Your rights' and 'Your obligations' sections in **PART 1** of this claim.
- the information I have given on this form is complete and correct.

#### I authorise:

- Services Australia to make enquiries necessary to establish my correct entitlement to pension or allowance.
- the US Social Security Administration to release any information or evidence in its possession which relates or could relate to my application for pension.

#### I understand that:

- I must return all supporting documents at the same time as I lodge my claim form. If I do not return all documents, my claim may not be accepted. The only exception will be if I am waiting for medical evidence or other documents from a third party.
- giving false or misleading information is a serious offence.

Your signature

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Your partner's signature

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

## What to do now

- 1 **Keep the Notes for claiming Australian Pension (PART 1)** for your future reference.
- 2 Check that all required questions are answered and that all forms are signed and dated.

**Important Note:** You must return **all** supporting documents at the same time you lodge this form. If you do not return all documents, your claim may not be accepted. The only exception will be if you are waiting for medical evidence or other documents from a third party.

You can return forms and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicessaustralia.gov.au/centrelinkuploaddocs](https://servicessaustralia.gov.au/centrelinkuploaddocs)
- **in person** at your local US Social Security Administration (SSA) field office.
- **by post** to your local US Social Security Administration (SSA) field office.
- **by post** to Services Australia:  
Services Australia  
International Services  
PO Box 7809  
CANBERRA BC ACT 2610  
Australia

While you can lodge your forms direct with us, lodging with your local SSA field office will normally make it easier and faster for you to receive a decision on your claim.

If you lodge with the SSA field office they will copy original documents for you and return them to you. The SSA field office will forward all forms and supporting documentation to the international section of the SSA. The international section will forward everything to Services Australia.

If you send original documents to us, we will make copies and return the original documents to you.

The claim forms do not need to be copied. If you do copy the claim forms, make sure you keep a copy, not the original.

If you need advice call us direct (free of charge) on **1866 3433 086** between 8 am and 5 pm (Hobart Time), Monday to Friday. This service may not be available from all locations in the USA. If this service is not available call us in Australia on **+61 3 6222 3455**.