



Ref. No. \_\_\_\_\_

### STATEMENT OF FINANCIAL DEPENDENCY

This form should be completed if you are claiming to have been wholly or partially financially dependent on the deceased member at the time of the member’s death.

The level of financial dependency a person had on the deceased member is a relevant consideration in reviewing a trustee’s decision about how to distribute the death benefit.

The financial support provided to you by the deceased member may include:

- Paying part or all rent/mortgage
- Paying part or all food, clothing, utilities, insurance
- Carrying out or paying part or all repairs and alterations to your home
- Paying part or all education expenses
- Making child support payments

### YOUR FINANCIAL DEPENDENCY AT TIME OF DEATH OF THE MEMBER

Payments made by the deceased member until the date of death

Type of support	Frequency	Amount (\$)
<i>Eg: rent</i>	<i>fortnight</i>	<i>280.00</i>

**Please provide supporting documentation.**

Payments jointly made by the deceased member and you until the date of death

Type of support	Frequency	Amount (\$)

**Please provide supporting documentation.**

**Your occupation at the time of the deceased member's death:** \_\_\_\_\_

**Your income at the time of the deceased member's death:** \$\_\_\_\_\_

Is there anything else we should consider when looking at your financial dependency on the deceased member?

**STATEMENT**

**I declare that the information on this form is complete and correct.**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_/\_\_\_\_/\_\_\_\_\_  
(Date)

The information you provide will be provided to the other parties to the complaint. Please refer to the attached Personal Information Collection Notice for further information.

## **PERSONAL INFORMATION COLLECTION NOTICE**

### **Collection of personal information**

We collect your personal information for the purposes of performing our statutory functions under the *Superannuation (Resolution of Complaints) Act 1993* (Complaints Act). These functions relate to the resolution of complaints made to us about decisions made by superannuation entities.

We collect personal information about you through your participation in our complaints handling processes. We also collect personal information about you from other parties to the complaint. These other parties usually include:

- the trustees of the superannuation entities complained about
- the person who has made the complaint (complainant)
- any relevant insurer
- in relation to a complaint about the distribution of a death benefit, other persons who may claim an entitlement to all or part of the benefit.

If this information is not collected by the Tribunal it may not be able to properly investigate and resolve the complaint. The Complaints Act may require or authorise the Tribunal to collect this information.

### **Disclosure of your personal information**

We disclose personal information for the purposes of our statutory functions under the Complaints Act. This includes disclosures to other parties to a complaint to ensure that we accord procedural fairness to all parties in our dispute resolution processes.

We may also disclose your personal information to other persons where you consent or there are other circumstances where disclosure is permitted under the *Privacy Act 1988*. These circumstances include disclosure to appropriate persons where:

- the disclosure is required or authorised by law
- you would reasonably expect that the information is used for that purpose and the purpose relates to our functions
- it will lessen or prevent a serious threat to somebody's life, health or safety, or to public health or safety
- it is reasonably necessary for enforcement related activities of an enforcement body.

In dealing with a complaint it is possible that we may be required to disclose personal information to a person involved in the complaint who is outside Australia. Disclosure of personal information to an overseas recipient depends on the facts of the particular complaint, and this could occur in relation to any foreign country.

### **Privacy policy**

Our Privacy Policy contains information about:

- how you can seek access to personal information that we hold about you or request that we make corrections to that information
- how you may make a complaint about our handling of your personal information.

You can read our complete Privacy Policy on our website at [www.sct.gov.au](http://www.sct.gov.au) or you can request that we provide you with a copy by contacting us on the Contact Details above.