When to use this form

Use this form to claim the following:

**Age Pension**

The Age Pension provides income support and access to a range of concessions for eligible older Australians. The Age Pension is paid at different rates depending on a person’s circumstances and includes incentives for people to maximise their overall income.

**Pension Bonus**

The Pension Bonus is a tax free lump sum payment for registered members of the Pension Bonus Scheme who have deferred claiming Age Pension and stayed in paid work. The scheme is closed to new registrations. If you are registered in the scheme you must claim the bonus at the same time you claim Age Pension. Conditions apply.

What else you may need to provide

You may need to provide identity documents. For a list of acceptable documents refer to Confirming your identity in the *Information you need to know about your claim for Age Pension and Pension Bonus (CI006) (Information Booklet).*

Online Services

You can access your Centrelink online account through myGov. myGov is a simple and secure way to access a range of government services online with one username and password. You can create a myGov account at [my.gov.au](http://my.gov.au) and link it to your Centrelink online account. To make a claim online, access your Centrelink online account through myGov, then select ‘Online Claims’ from the menu.

Filling in this form

- Please use black or blue pen.
- Print in BLOCK LETTERS.
- Mark boxes like this □ with a ✓ or X.
- Where you see a box like this □ Go to 5 skip to the question number shown. You do not need to answer the questions in between.

Returning your form

Check that you have answered all the questions you need to answer, and that you (and your partner if they are claiming a payment) have signed and dated this form.

**Important Note:** You must return all supporting documents at the same time you lodge this 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.

You can return this form and any supporting documents:

- online — submit your documents online (excluding identity documents). For more information about how to access an Online Account or how to lodge documents online, go to [humanservices.gov.au/submitdocumentsonline](http://humanservices.gov.au/submitdocumentsonline)
- by post — return your documents by sending them to:
  - Department of Human Services
  - Seniors Services
  - Reply Paid 7808
  - CANBERRA BC ACT 2610
- in person — if you are unable to submit this form and any supporting documents online or by post, you can provide them in person to one of our service centres.
For more information

Refer to the Information Booklet at humanservices.gov.au/agepension

If you need a translation of any documents for our business, we can arrange this for you free of charge.

To speak to us in languages other than English, call 131 202.

Note: Call charges may apply.

If you have a hearing or speech impairment, you can contact the TTY service on Freecall™ 1800 810 586. A TTY phone is required to use this service.

How to claim

If you have a partner and you are both claiming Age Pension, you may choose to complete one claim pack together or complete a separate claim pack for each person.

If your partner is not claiming Age Pension they still need to provide their details. They can do so on this form or a separate Partner Details form (Mod P). If you do not have this form, go to humanservices.gov.au/forms

Complete the claim form(s) and any additional forms required. You may choose to use an accountant or financial adviser to complete your Income and Assets form (SA369) but you must sign it. If you need other people to assist with completing your forms, make sure you give them the forms as soon as possible.

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

Age Pension for people who are permanently blind

Make an appointment with the ophthalmologist/optometrist who usually treats you (and/or your partner). You should have been given a Request for Ophthalmologist/Optometrist Report form (SA013). If you do not have this form, go to humanservices.gov.au/forms

When you (and/or your partner) make the appointment, tell the receptionist that you (and/or your partner) need the optician to complete a form for us, as they may need to allow more time. The optician may complete the report and give it back to you (or your partner) or they may send it directly to us. Make sure the report has your (or your partner’s) name and address on it.

Department of Veterans' Affairs Disability Pension payment option

If you (and/or your partner) currently get a Disability Pension from the Department of Veterans' Affairs (DVA), you can both choose to have your Age Pension paid by DVA instead of us. You will need to complete the claim forms but lodge them with DVA (contact your local DVA office for lodgement details).

Forms in your claim pack

In your claim pack, you should have the following:

- Claim for Age Pension and Pension Bonus form (SA002)
### Age Pension

1. Do you have a partner?
   - No  Go to 4
   - Yes  We require your partner’s details to assess your claim. Go to next question

2. Is your partner also claiming Age Pension?
   - No  Your partner can provide their details on this form or a separate Partner details form (Mod P). Go to next question
   - Yes  Your partner can claim on this form or on a separate claim form. Go to next question

3. Indicate if your partner is using this form or a separate form for a claim or to provide their details.
   - This form
   - Separate form

### You

4. Your name
   - Mr  Mrs  Miss  Ms  Other
   - Family name
   - First given name
   - Second given name

5. Have you ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?
   - No  Go to next question
   - Yes  Give details below

<table>
<thead>
<tr>
<th>1</th>
<th>Other name</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Type of name (e.g. name at birth)</td>
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<tr>
<th>2</th>
<th>Other name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type of name (e.g. maiden name)</td>
</tr>
</tbody>
</table>

   If you have more than 2 other names, attach a separate sheet with details.

### Your partner

4. Your name
   - Mr  Mrs  Miss  Ms  Other
   - Family name
   - First given name
   - Second given name

5. Have you ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?
   - No  Go to next question
   - Yes  Give details below

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<table>
<thead>
<tr>
<th><strong>You</strong></th>
<th><strong>Your partner</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6</strong> Your gender&lt;br&gt; Male ☐&lt;br&gt; Female ☐</td>
<td><strong>6</strong> Your gender&lt;br&gt; Male ☐&lt;br&gt; Female ☐</td>
</tr>
<tr>
<td><strong>7</strong> Your date of birth&lt;br&gt; / /</td>
<td><strong>7</strong> Your date of birth&lt;br&gt; / /</td>
</tr>
<tr>
<td><img src="Image" alt="Footnote" /> If you are claiming Age Pension, provide proof of your date of birth.</td>
<td><img src="Image" alt="Footnote" /> If you are claiming Age Pension, provide proof of your date of birth.</td>
</tr>
<tr>
<td><strong>8</strong> Your permanent address</td>
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</tr>
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<td><img src="Image" alt="Footnote" /></td>
<td><img src="Image" alt="Footnote" /></td>
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<tr>
<td><strong>9</strong> Your postal address (if different to above)</td>
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</tr>
<tr>
<td><img src="Image" alt="Footnote" /></td>
<td><img src="Image" alt="Footnote" /></td>
</tr>
<tr>
<td><strong>10 Please read this before answering the following question.</strong>&lt;br&gt; 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 humanservices.gov.au/em or visit one of our service centres.</td>
<td><strong>10 Please read this before answering the following question.</strong>&lt;br&gt; 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 humanservices.gov.au/em or visit one of our service centres.</td>
</tr>
<tr>
<td>Your contact details&lt;br&gt; Home phone number&lt;br&gt; ( )</td>
<td>Your contact details&lt;br&gt; Home phone number&lt;br&gt; ( )</td>
</tr>
<tr>
<td><img src="Image" alt="Footnote" /> Is this a silent number? No ☐ Yes ☐</td>
<td><img src="Image" alt="Footnote" /> Is this a silent number? No ☐ Yes ☐</td>
</tr>
<tr>
<td>Mobile phone number</td>
<td>Mobile phone number</td>
</tr>
<tr>
<td>Fax number&lt;br&gt; ( )</td>
<td>Fax number&lt;br&gt; ( )</td>
</tr>
<tr>
<td>Work phone number&lt;br&gt; ( )</td>
<td>Work phone number&lt;br&gt; ( )</td>
</tr>
<tr>
<td>Alternative phone number&lt;br&gt; ( )</td>
<td>Alternative phone number&lt;br&gt; ( )</td>
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<td>Email&lt;br&gt;</td>
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<td><img src="Image" alt="Footnote" /></td>
<td><img src="Image" alt="Footnote" /></td>
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</tbody>
</table>
### You

**11** Are you of Aboriginal or Torres Strait Islander Australian descent? If you are of both Aboriginal and Torres Strait Islander Australian descent, please tick both ‘Yes’ boxes.

<table>
<thead>
<tr>
<th></th>
<th>Yes – Aboriginal Australian</th>
<th>Yes – Torres Strait Islander Australian</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td></td>
<td></td>
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</tbody>
</table>

**12** Are you of Australian South Sea Islander descent?

<table>
<thead>
<tr>
<th></th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

**13** Do you need an interpreter when dealing with us? This includes an interpreter for people who have a hearing or speech impairment.

- No  [Go to 16](#)
- Yes  [Go to next question](#)

**14** What is your preferred spoken language?

<p>| |</p>
<table>
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<th></th>
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</table>

**15** What is your preferred written language?

<p>| |</p>
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</table>

**16** Do you want to authorise another person or organisation to make enquiries, get payments and/or act on your behalf?

- No  [Go to next question](#)
- Yes  [Go to next question](#)

#### Note

You will need to complete and attach an Authorising a person or organisation to enquire or act on your behalf form (SS313). If you do not have this form or want more information about nominee arrangements, go to [humanservices.gov.au/nominees](http://humanservices.gov.au/nominees).

**17** Do you give permission for your partner to make enquiries with us on your behalf? You can change this authority at any time.

<table>
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<th></th>
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<th>Yes</th>
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### Your partner

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- Yes  [Go to next question](#)

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You

18 What country are you currently living in?
   The country of residence is where you normally live on a long term basis.
   [Australia] Yes, [Other] Go to next question

19 Have you EVER travelled outside Australia, including short trips and holidays?
   This question assists us to verify your Australian residence.
   [No] Go to next question
   [Not applicable – Never] Go to next question
   [Yes] Give details below
   Year you last entered Australia
   Passport number
   Country of issue

20 Are you an Australian citizen who was born in Australia?
   No [ underline] You will need to provide proof of your Australian residence status (e.g. citizenship papers, passport or other documentation).
   Yes [ underline] Go to next question

21 What is your country of birth?

22 What is your country of citizenship?
   [Australia] Yes, [Other] Go to next question
   Date granted
   Country of citizenship
   Date granted

23 Have you ever lived in Australia?
   No [ underline] Go to next question
   Yes [ underline] Go to next question

Your partner

18 What country are you currently living in?
   The country of residence is where you normally live on a long term basis.
   [Australia] Yes, [Other] Country of residence

19 Have you EVER travelled outside Australia, including short trips and holidays?
   This question assists us to verify your Australian residence.
   [No] Go to next question
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   Yes [ underline] Go to next question

21 What is your country of birth?

22 What is your country of citizenship?
   [Australia] Yes, [Other] Go to next question
   Date granted
   Country of citizenship
   Date granted

23 Have you ever lived in Australia?
   No [ underline] Go to next question
   Yes [ underline] Go to next question
You

24 What type of visa did you arrive on?
New Zealand passport [Go to 26] (Special Category visa)
Permanent [Go to next question]
Temporary [Go to next question]
Unknown (e.g. arrived on parent’s passport) [Go to 26]

25 Your visa details on arrival
Visa sub class
Date visa granted
/
/

26 Has your visa changed since you arrived in Australia?
No [Go to next question]
Yes [Go to next question]
Most recent visa details
Visa sub class
Date visa granted
/
/

27 When did you most recently start living in Australia?
/
/

28 Did you start living in Australia before 1965?
No [Go to next question]
Yes [Go to next question]
Give details below
Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

Your partner

24 What type of visa did you arrive on?
New Zealand passport [Go to 26] (Special Category visa)
Permanent [Go to next question]
Temporary [Go to next question]
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Visa sub class
Date visa granted
/
/

26 Has your visa changed since you arrived in Australia?
No [Go to next question]
Yes [Go to next question]
Most recent visa details
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Date visa granted
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27 When did you most recently start living in Australia?
/
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28 Did you start living in Australia before 1965?
No [Go to next question]
Yes [Go to next question]
Give details below
Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

29 Are you a refugee or former refugee?
No
Yes

29 Are you a refugee or former refugee?
No
Yes
30 Please read this before answering the following question.

We need to know if you have lived in any countries other than Australia. '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.

Have you EVER lived outside Australia for any period?

No □ Go to next question
Yes □ List ALL countries you have lived in since birth and the date you started living in each country. Include when you started living in AUSTRALIA. Do NOT include short trips or holidays.

1 Country of residence

From / / To / /

2 Country of residence

From / / To / /

3 Country of residence

From / / To / /

4 Country of residence

From / / To / /

5 Country of residence

From / / To / /

6 Country of residence

From / / To / /

If you require more space, attach a separate sheet with details.
### You

#### 31 Where do you want your payment made?

The bank, building society or credit union account must be in your name. A joint account is acceptable.

**Note:** Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

<table>
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<th>Name of bank, building society or credit union</th>
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<tr>
<td>Branch where the account is held</td>
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</tr>
<tr>
<td>Branch number (BSB)</td>
<td></td>
</tr>
<tr>
<td>Account number (this may not be your card number)</td>
<td></td>
</tr>
<tr>
<td>Account held in the name(s) of</td>
<td></td>
</tr>
</tbody>
</table>

#### 32 Please read this before answering the following question.

The pension supplement helps you to meet the costs of your daily household and living expenses. It is automatically paid each fortnight with your regular pension.

You have the option to receive part of the pension supplement on a quarterly basis. This part is known as the minimum pension supplement amount. You may find this option useful for budgeting purposes. If you choose this option, the minimum pension supplement amount accrues daily during the quarter and is paid as soon as possible after 20 March, 20 June, 20 September and 20 December with your fortnightly pension payment.

The option to get the minimum pension supplement as a fortnightly payment or quarterly payment can be changed at any time.

How often do you wish to receive the minimum pension supplement amount?

- **Fortnightly** □
- **Quarterly** □

### Your partner

#### 31 Where do you want your payment made?

The bank, building society or credit union account must be in your name. A joint account is acceptable.

**Only give details if you are also claiming Age Pension on this form.**

**Note:** Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

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The option to get the minimum pension supplement as a fortnightly payment or quarterly payment can be changed at any time.

How often do you wish to receive the minimum pension supplement amount?

- **Fortnightly** □
- **Quarterly** □
You

33 Please read this before answering the following questions.

You are not breaking the law if you do not give us your tax file number, but if you do not provide it to us, or authorise us to get it from the Australian Taxation Office, you may not be paid.

In giving us your tax file number in relation to this claim you authorise us to use your tax file number for other social security payments and services in future where necessary.

Have you given us your tax file number before?
No  Go to next question
Not sure  Go to next question
Yes  Go to 35

34 Do you have a tax file number?
No  Please call us on 132 300.
Yes  Your tax file number

35 Please read this before answering the following question.

If your only income for this financial year is the payment you are now claiming, you may not have to pay any tax.
However, you may have to pay tax if you get any other income this financial year, such as salary or wages.
If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your payment.
You can change this at any time.
If you are not sure how much tax to have taken out of your payment, contact the Australian Taxation Office.

Do you want tax taken out of your payment?
No  Go to next question
Yes  Enter the amount OR percentage of tax you want taken out per fortnight.

<table>
<thead>
<tr>
<th>Amount (must be in whole dollars)</th>
<th>Percentage (%) of taxable payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ .00 per fortnight</td>
<td>OR % per fortnight</td>
</tr>
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Your partner

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No  Go to next question
Not sure  Go to next question
Yes  Go to 35

34 Do you have a tax file number?
No  Please call us on 132 300.
Yes  Your tax file number

35 Please read this before answering the following question.

Only answer this question if you are also claiming Age Pension on this form.
If your only income for this financial year is the payment you are now claiming, you may not have to pay any tax.
However, you may have to pay tax if you get any other income this financial year, such as salary or wages.
If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your payment.
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<tbody>
<tr>
<td>$ .00 per fortnight</td>
<td>OR % per fortnight</td>
</tr>
</tbody>
</table>
36 Please read this before answering the following question.

We recognise both different-sex and same-sex relationships. This includes de facto relationships and relationships registered under state or territory law.

Select ONE option below that best describes your current relationship status.

What is your CURRENT relationship status?

- Married
- Registered relationship
- Partnered
- Separated
- Divorced
- Widowed
- Never married or lived with a partner

37 What is your date of marriage or relationship registration?

If you have ever been separated, list the date that you most recently reconciled with your partner.

38 When did you and your partner start your relationship?

If you have ever been separated, list the date that you most recently reconciled with your partner.

39 Do you currently live in the same home as your partner?

39a Do you currently live in the same home as your partner?

- Yes
- No

40 Why are you not living with your partner?

Partner’s illness
Your illness
Partner in prison
Partner’s employment
Other

41 Period not living with your partner

From / / 
To / / OR indefinite

42 Please give the following details about your deceased partner.

Full Name

Date of birth Date of death

43 Do you live in the same home as your former partner?

- Yes
- No

44 Please give the following details about your former partner.

Full Name

Date of birth Date relationship ended

Current address (if known)

Postcode

45 Have you re-married, entered into a new registered relationship or re-partnered (including de facto)?

- Yes
- No

46 Do you share your accommodation with anyone other than immediate family members?

- Yes
- No
Please read this before answering the following questions.

The following questions are to be completed if you share your accommodation with anyone other than immediate family members. This includes anyone who:
- regularly stays any number of nights per week
- uses your home as a base (e.g. truck drivers, miners, flight attendants or members of the armed forces).

We need full details about your living arrangements to work out your correct payment.
The questions on this form will assist us to decide whether we need additional information.

Give details of each person who shares your accommodation.
Do not include immediate family members.

Person 1
Name

Age  Gender

When did you start sharing with this person?

What is your relationship to this person?

Have you shared accommodation, at another address, with this person?

Have you and this person previously lived together as a couple (e.g. married, partnered, de facto or in a registered relationship)?

Do you and this person share the parent/guardianship of any children?

Have you and this person ever had any joint financial commitments (e.g. joint bank account, mortgage or other loans)?

If you participate in activities jointly with this person, are you considered to be a couple?

Are you concerned about your safety if forms are issued to this person?

No
Yes
Person 2

Name

Age

Gender

Male ☐ Female ☐

When did you start sharing with this person?

/ / |

What is your relationship to this person?

Have you shared accommodation, at another address, with this person?

No ☐
Yes ☐

Have you and this person previously lived together as a couple (e.g. married, partnered, de facto or in a registered relationship)?

No ☐
Yes ☐

Do you and this person share the parent/guardianship of any children?

No ☐
Yes ☐

Have you and this person ever had any joint financial commitments (e.g. joint bank account, mortgage or other loans)?

No ☐
Yes ☐

Give details below

If you participate in activities jointly with this person, are you considered to be a couple?

No ☐
Yes ☐

Give details below

Are you concerned about your safety if forms are issued to this person?

No ☐
Yes ☐

If share with more than 3 people, attach a separate sheet with details.

Person 3

Name

Age

Gender

Male ☐ Female ☐

When did you start sharing with this person?

/ / |

What is your relationship to this person?

Have you shared accommodation, at another address, with this person?

No ☐
Yes ☐

Have you and this person previously lived together as a couple (e.g. married, partnered, de facto or in a registered relationship)?

No ☐
Yes ☐

Do you and this person share the parent/guardianship of any children?

No ☐
Yes ☐

Have you and this person ever had any joint financial commitments (e.g. joint bank account, mortgage or other loans)?

No ☐
Yes ☐

Give details below

If you participate in activities jointly with this person, are you considered to be a couple?

No ☐
Yes ☐

Give details below

Are you concerned about your safety if forms are issued to this person?

No ☐
Yes ☐

If share with more than 3 people, attach a separate sheet with details.
48 Do you (and/or your partner) own a home but live elsewhere?

No □ Go to next question

Yes □ What is the reason you live away from the home you own?

- Travelling away from your home
- Being cared for away from your home
- Caring for someone away from your home
- Living away from home to study
- Other □ Give details below

49 Have you (and/or your partner) sold your former home within the last 24 months and intend to purchase or construct a new home?

No □ Go to next question

Yes □ Give details below

What was the date of settlement?

/ / / 

What was the amount you received after any mortgage and costs were taken out of the sale price?

$ 

Attach documents to verify the details of the sale (e.g. settlement statement). Copies are acceptable.

What is the total amount you have used, or intend to use, on the purchase or construction of your new home (cannot exceed the amount of the sale proceeds)?

$ 

Expected date of completion of your new home

/ / / 

50 Which of the following best describes where you live?

□ In a home which is owned by a private company or a private trust that you have an interest in

□ In a home you (and/or your partner) own or you own jointly with another person, this can include:

- paying it off (mortgage)
- a caravan, transportable home or boat

□ In a hospital or home for people with disabilities

□ In a nursing home or aged care hostel

□ In a retirement village

□ In accommodation which you (and/or your partner) have the right to use for life

□ In public housing (e.g. housing owned by the Housing Authority. This does not include paying rent to a Community Housing organisation.)

□ In a place where you (and/or your partner) pay private rent (this includes site or mooring fees)

□ In a boarding house/hostel/private hotel

□ In accommodation where you pay no rent

□ Other (e.g. this could be where you (and/or your partner) do not have a fixed address)

Give details below

51 Do you pay site, ground or mooring fees for the home you own (this could be for a caravan, transportable home or boat)?

No □ Do not answer questions 52 to 79. Go to 80

Yes □ Go to 69

52 Are you (and/or your partner) the primary tenant(s)?

That is, your (and/or your partner’s) name is on the tenancy agreement (lease) with the public housing authority.

No □ Go to next question

Yes □ Do not answer questions 53 to 79. Go to 80
53 Does the primary tenant pay rent at the market rate?
   No □ Go to next question
   Not sure □ Go to next question
   Yes □ Go to 70

54 Do you (and/or your partner) live with the primary tenant(s) AND your (and/or your partner’s) income has been taken into account by the public housing authority when calculating the rent?
   No □ Do not answer questions 55 to 79. Go to 80
   Yes □ Go to 70

55 Name of aged care hostel/nursing home

56 What date did you move into the aged care hostel or enter the nursing home?

57 How long will you be staying?
   Long term or □ Go to next question
   indefinitely
   Respite care □ When do you expect to leave?

58 Does this aged care hostel or nursing home receive an Australian Government subsidy for your accommodation?
   Check with your service provider to find out if they receive any Australian Government subsidy.
   No □ Attach documents showing the details of the entry agreement for daily fees. Copies are acceptable.
   □ Go to next question
   Not sure □ Go to next question
   Yes □ Go to next question

59 Did you pay an accommodation bond or charge?
   Your accommodation bond may have been a donation, a loan or some type of payment which may be repayable to you in whole or in part, if you leave. An accommodation bond does not include gifts or loans above the amount you had to pay for the right to your accommodation.
   No □ Go to next question
   Yes □ How much accommodation bond did you pay?

60 Did you make a gift and/or loan in addition to the accommodation bond?
   No □ Go to 80
   Yes □ How much was the gift?
   □ Go to 80
   How much was the loan?

61 What date did you (and/or your partner) move into the retirement village?

62 Did you (and/or your partner) pay an entry contribution?
   Your entry contribution may have been a donation, a loan or some type of payment which may be repayable to you in whole or in part, if you leave. An entry contribution does not include gifts or loans above the amount you had to pay for the right to your accommodation.
   No □ Go to next question
   Yes □ How much entry contribution did you pay?

   □ Go to 80
   □ Attach documents to verify the details of your entry contribution (e.g., your contract). Copies are acceptable.
63 Did you (and/or your partner) make a gift and/or loan in addition to the entry contribution?

No  Go to 70
Yes  How much was the gift?

$  

How much was the loan?

$  

Go to 70

64 Did you (and/or your partner) pay a sum of money and/or transfer assets to another person in return for this accommodation for life?

No  Go to next question
Yes  Go to 66

65 Tick which option describes how you (and/or your partner) obtained a life interest in a home without any exchange of money or transfer of assets:

- Inherited the life interest  Go to 80
- Have a formal agreement documenting your right to accommodation for life  Go to 80
- Have an informal arrangement with children to live at their home and pay rent  Go to 69
- Informal arrangement, no rent paid  Go to 80
- Other  Give details below  Go to 69

Go to 69

66 What date did you (and/or your partner) make this payment/transfer?

/ / 

67 Details of the payment/transfer

How much did you (and/or your partner) pay?

$ 

AND/OR

What assets were transferred?

...............................................................

Market value of assets transferred?

$ 

68 Details of the person or organisation the payment/transfer was made to

Full name (of the person or organisation)

Address

Postcode

69 What type of accommodation do you (and your partner) live in?

Private house or townhouse/ unit/flat  Go to next question
Community housing  Go to next question
Defence housing  Go to next question
Caravan/cabin/mobile home  Go to 72
Boat  Go to 72
Boarding house/hostel/private hotel  Go to 72
Other  Give details below  Go to 72

Go to next question

Go to 69

Go to next question
70 **Please read this before answering the following question.**

Sharing your accommodation means that you have the right to use a kitchen, bedroom or bathroom with one or more persons. This includes ALL family members (except children which you are paid family assistance for), people who regularly stay at your accommodation and people who work away from home (e.g. truck drivers, miners, flight attendants or members of the armed forces).

Do you (and/or your partner) share your accommodation with other people?

No  [ ] Go to 72
Yes  [ ] Give details below of people who share your accommodation

<table>
<thead>
<tr>
<th>Person's name</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

When did they move in?  Relationship to you

/  /  

Their share of the rent/lodgings  Do they own the home?

$ per  No  Yes

If you share with more than 4 people, attach a separate sheet with details.

71 Do you (and/or your partner) share your accommodation with one or more of your children who receive a Centrelink payment, ABSTUDY or a service pension but do NOT receive Rent Assistance?

No  [ ]
Yes  [ ]

72 Do you (and/or your partner) pay board and/or lodgings?

Board means you (and/or your partner) are provided with some regular meals.
Lodgings means no meals are provided to you (and/or your partner).

No  [ ] Go to 74
Yes  [ ] Go to next question

73 Can you separate the amounts you (and/or your partner) pay for board and/or lodgings?

No [ ] Total board and lodgings charged per day, week, fortnight, 4 weeks or calendar month

| $ per |

Yes [ ] Amount paid for board (meals) per day, week, fortnight, 4 weeks or calendar month

| $ per |

Amount paid for lodgings (accommodation only) per day, week, fortnight, 4 weeks or calendar month

| $ per |

Go to 75

74 How much do you (and/or your partner) pay per day, week, fortnight, 4 weeks or calendar month (e.g. rent, maintenance or site fees)?

This would be the total you (and/or your partner) pay for the property minus any subsidy/rebate or contribution from another person or organisation.

| $ per |

75 When did you (and/or your partner) start paying this amount?

/  /

76 Do you (and your partner) live in a boarding house, hostel, private hotel, hospital or disability housing?

No  [ ] Go to next question
Yes  [ ] Go to 78

77 What is the total amount of rent charged for the property per day, week, fortnight, 4 weeks or calendar month?

| $ per |
78 Do you (and/or your partner) have a current lease or tenancy agreement with written evidence of the CURRENT amount of rent, fees, lodgings or board and lodgings you (and/or your partner) pay?

No  [ ]  Go to next question

Yes  [ ]  Attach a full copy of your signed lease or tenancy agreement.

79 Do you (and/or your partner) have a current lease or tenancy agreement with written evidence of the CURRENT amount of rent, fees, lodgings or board and lodgings you (and/or your partner) pay?

No  [ ]  Go to next question

Yes  [ ]  Attach a full copy of your signed lease or tenancy agreement.

80 Are you (and/or your partner) permanently blind?

No  [ ]  You will need to complete and attach the Income and Assets form (SA369). If you do not have this form, go to humanservices.gov.au/forms  [ ]  Go to 90

Yes  [ ]  You will need to complete and attach the Request for Ophthalmologist/Optometrist Report form (SA013) for each person claiming Age Pension for people who are permanently blind. If you do not have this form, go to humanservices.gov.au/forms  [ ]  Go to 90

81 Indicate who is permanently blind

Tick ONE box only

Both (you and your partner)  [ ]  Go to 83

You  [ ]  •  If you do NOT have a partner, Go to 83

•  If you do have a partner, Go to 82

Your partner  [ ]  You will need to complete and attach the Income and Assets form (SA369). If you do not have this form, go to humanservices.gov.au/forms  [ ]  Go to 90

82 Is your partner claiming or receiving a Centrelink payment?

No  [ ]  Go to next question

Yes  [ ]  You will need to complete and attach the Income and Assets form (SA369). If you do not have this form, go to humanservices.gov.au/forms  [ ]  Go to 90

83 Are you (and/or your partner) claiming Rent Assistance?

No  [ ]  Go to next question

Yes  [ ]  You will need to complete and attach the Income and Assets form (SA369). If you do not have this form, go to humanservices.gov.au/forms  [ ]  Go to 90

84 Are you (and/or your partner) receiving any payment from the New Zealand government?

No  [ ]  Go to next question

Yes  [ ]  Attach a copy of a letter or document which gives the reference number and details of each payment.

85 Are you (and/or your partner) receiving any payment from the Department of Veterans’ Affairs?

No  [ ]  Go to 87

Yes  [ ]  Go to next question

86 Which payment do you (and/or your partner) receive from the Department of Veterans’ Affairs?

Tick ALL that apply

Disability Pension (War Pension)  [ ]

Income Support Supplement  [ ]

Service Pension  [ ]

War Widow’s Pension  [ ]

War Widower’s Pension  [ ]

Other  [ ]

Not sure  [ ]

Attach a copy of a letter or other document which gives the reference number and details of each payment.

87 Do you (and/or your partner) receive a New Enterprise Incentive Scheme (NEIS) Allowance?

No  [ ]  Go to next question

Yes  [ ]  Attach a copy of a letter or other document(s) that shows the reference number and details for the payment (other than payments made by us).
88 Please read this before answering the following questions.

Include:
• workers’ compensation/damages as a result of a work injury
• third party damages as a result of a motor vehicle accident
• personal accident and sickness insurance or income replacement insurance
• sporting injury compensation
• public liability compensation
• medical negligence compensation
• damages paid to victims of crime or as a result of criminal injuries.

Have you (and/or your partner) ever CLAIMED or are you (and/or your partner) ABLE TO CLAIM compensation, insurance and/or damages?

No  Go to next question
Yes  You will need to complete and attach a Compensation and damages form (Mod C). If you do not have this form, go to humanservices.gov.au/forms

89 Are you (and/or your partner) RECEIVING or have you (and/or your partner) EVER BEEN PAID compensation, insurance and/or damages?

No  Go to next question
Yes  You will need to complete and attach a Compensation and damages form (Mod C). If you do not have this form, go to humanservices.gov.au/forms

90 Which of the following forms, documents and other attachments are you (and/or your partner) providing with this form?

If you are not sure, check the question to see if you should attach the documents.

Where you are asked to supply documents, please attach original documents. In some circumstances copies may be accepted, as detailed in the below checklist.

You must return this form and all supporting documents at the same time you lodge this 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.

Identity documents
Each person claiming Age Pension may be required to provide identity documents. There is a list of acceptable documents in the Information Booklet

Proof of date of birth
(at question 7)

Authorising a person or organisation to enquire or act on your behalf form (SS313)
(if you answered Yes at question 16)

Proof of Australian residence status
(if you answered No at question 20)

Copies of documents to verify the details of the sale of your former home (e.g. settlement statement)
(if you answered Yes at question 49)

Copy of proof of entry agreement for daily fees
(if you answered No at question 58)

Copy of accommodation bond or accommodation charge agreement
(if you answered Yes at question 59)

Copy of proof of entry contribution
(if you answered Yes at question 62)

Signed lease or tenancy agreement
(if you answered Yes at question 79)

Income and Assets form (SA369)
(if you answered No at question 80)

Request for Ophthalmologist/Optometrist Report form (SA013)
(if you answered Yes at question 80)

Income and Assets form (SA369)
(if you answered Your partner at question 81)

Income and Assets form (SA369)
(if you answered Yes at question 82 or 83)

Copy of a letter or document which gives the reference number and details of each New Zealand payment
(If you answered Yes at question 84)

Copy of a letter or document which gives details of Department of Veterans’ Affairs payment(s) and reference number(s)
(if required for question 86)

Copy of a letter or document which gives the reference number and details of the NEIS Allowance
(if you answered Yes at question 87)

Compensation and damages form(s) (Mod C)
(if you answered Yes at question 88 and/or 89)
91 IMPORTANT INFORMATION

Privacy and your personal information
Your personal information is protected by law (including the Privacy Act 1988) and is collected by the Australian Government Department of Human Services for the assessment and administration of payments and services. This information is required to process your application or claim.

Your information may be used by the department, or given to other parties where you have agreed to that, or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which the department will manage your personal information, including our privacy policy, at humanservices.gov.au/privacy

92 Statement

I/We declare that:

• the information I/we have provided in this form is complete and correct.

I/We understand that:

• giving false or misleading information is a serious offence.
• I/we must return all supporting documents at the same time as I/we lodge my/our claim form. If I/we do not return all documents, my/our claim may not be accepted. The only exception will be if I/we are waiting for medical evidence or other documents from a third party.
• the Australian Government Department of Human Services can make relevant enquiries to make sure I/we receive the correct entitlement.
• I/we must notify the Australian Government Department of Human Services of any changes to this information within 14 days of the change(s) occurring.

Your signature

Date

93 Please read this before answering the following question.

The following question asks whether you (and/or your partner) wish to claim the Pension Bonus.

To be paid a Pension Bonus you must be a registered member of the Pension Bonus Scheme. The scheme is closed to new registrations. You must claim the Pension Bonus at the same time you claim Age Pension. When claiming your Pension Bonus timing is important. If you have any questions or concerns call us on 132 300 and ask to talk to a Financial Information Service Officer. For more information, go to humanservices.gov.au/pensionbonusscheme

Are you (and/or your partner) a registered member of the Pension Bonus Scheme?

No □ You (and/or your partner) are not eligible for a Pension Bonus. If you (and/or your partner) have answered all questions relating to the Claim for Age Pension you (and/or your partner) have completed the form.

Yes □ Go to next question

94 Are you (and/or your partner) a registered member with the Department of Veterans’ Affairs?

No □ Go to next question

Yes □ Give details below

You

What is your Pension Bonus file number, with the Department of Veterans’ Affairs?

Your partner

What is your Pension Bonus file number, with the Department of Veterans’ Affairs?

Go to next question
Pension Bonus

STOP Complete the following questions only if you (and/or your partner) are already registered in the Pension Bonus Scheme and now wish to claim. Do not answer these questions if you (and/or your partner) are only claiming Age Pension.

### You

1. Have you previously claimed or received a Pension Bonus from the Department of Veterans’ Affairs, Centrelink or the Department of Human Services?
   - No [ ] Go to next question
   - Yes [ ] Date paid or date rejected

2. Has your relationship status changed since your Pension Bonus Scheme registration date?
   - No [ ] Go to next question
   - Yes [ ] Give details below

<table>
<thead>
<tr>
<th>Relationship status</th>
<th>Date from</th>
<th>Partner’s name (when applicable)</th>
</tr>
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</tr>
</tbody>
</table>

3. Please read this before answering the following questions about the work test.

   The **work test** for the Pension Bonus Scheme requires you to complete at least 960 hours of gainful work each year. This is an average of 20 hours per week for 48 weeks each year. At least 640 of these hours must have been worked in Australia. For more information, go to humanservices.gov.au/pensionbonusscheme

4. When did you cease meeting the work test?
   - / /

5. Are you claiming a bonus on the basis of your work?
   - No [ ]
   - Yes [ ]

6. Are you claiming a bonus on the basis of your partner’s work?
   - No [ ]
   - Yes [ ]
   - Not applicable (no partner) [ ]

### Your partner

1. Have you previously claimed or received a Pension Bonus from the Department of Veterans’ Affairs, Centrelink or the Department of Human Services?
   - No [ ] Go to next question
   - Yes [ ] Date paid or date rejected

2. Has your relationship status changed since your Pension Bonus Scheme registration date?
   - No [ ] Go to next question
   - Yes [ ] Give details below

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4. When did you cease meeting the work test?
   - / /

5. Are you claiming a bonus on the basis of your work?
   - No [ ]
   - Yes [ ]

6. Are you claiming a bonus on the basis of your partner’s work?
   - No [ ]
   - Yes [ ]
An evidentiary certificate is a letter issued by us which certifies that you (or your partner) have been an accruing member of the scheme for a bonus period because you (and/or your partner) have met the work test.

If you (and/or your partner) are providing work records you will need to attach evidence such as payment summaries (group certificates), income tax returns, time sheets or the completed work record(s).

You can get a copy of the Work record for the Pension Bonus Scheme by going to humanservices.gov.au/customer/enablers/centrelink/pension-bonus-scheme/the-work-test

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to next question</td>
<td>Date from</td>
</tr>
</tbody>
</table>

### Provide details about the work you have done to meet the work test.

1. **Worked from** | **Worked to** | **Evidentiary certificate**
---|---|---
| / / | / / | OR
| Work record |

2. **Worked from** | **Worked to** | **Evidentiary certificate**
---|---|---
| / / | / / | OR
| Work record |

3. **Worked from** | **Worked to** | **Evidentiary certificate**
---|---|---
| / / | / / | OR
| Work record |

4. **Worked from** | **Worked to** | **Evidentiary certificate**
---|---|---
| / / | / / | OR
| Work record |

5. **Worked from** | **Worked to** | **Evidentiary certificate**
---|---|---
| / / | / / | OR
| Work record |

6. Since your Pension Bonus Scheme registration date have you claimed or received a Carer Payment from us or a Carer Service Pension from the Department of Veterans’ Affairs?

   No | Yes |
   ---|-----|
   Go to next question | Date from | Date to |

   / / | / / |
9 Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

Yes Date from Date to

No Go to next question

9 Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

Yes Date from Date to

No Go to next question

10 Since your Pension Bonus Scheme registration date have you been imprisoned?

Yes Date from Date to

No Go to next question

10 Since your Pension Bonus Scheme registration date have you been imprisoned?

Yes Date from Date to

No Go to next question

11 Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

Yes Date from Date to

No Go to next question

11 Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

Yes Date from Date to

No Go to next question

12 Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

Yes Date from Date to

No Go to next question

12 Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

Yes Date from Date to

No Go to next question

13 Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

Yes Date from Date to

No Go to next question

13 Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

Yes Date from Date to

No Go to next question

14 Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (e.g. Cyclone Larry, the Queensland floods or Victorian bush fires)?

Yes Date from Date to

No Go to next question

14 Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (e.g. Cyclone Larry, the Queensland floods or Victorian bush fires)?

Yes Date from Date to

No Go to next question
### You

15. Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (e.g. family, recreation, sick, long service, carer)?

- **No** [Go to next question](#)
- **Yes** [Give details below](#)

<table>
<thead>
<tr>
<th>Type of leave</th>
<th>Date from</th>
<th>Date to</th>
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</table>

16. In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away any money or other assets, or sold assets for less than their market value?

- **No** [Go to next question](#)
- **Yes** [Give details below](#)

<table>
<thead>
<tr>
<th>What did you give away or sell?</th>
<th>Date of gift/sale</th>
<th>What was it worth?</th>
<th>How much did you get for it?</th>
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If you have given away or sold for less than its market value more than 3 items, attach a separate sheet with details.

### Your partner

15. Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (e.g. family, recreation, sick, long service, carer)?

- **No** [Go to next question](#)
- **Yes** [Give details below](#)

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- **No** [Go to next question](#)
- **Yes** [Give details below](#)

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<tr>
<th>What did you give away or sell?</th>
<th>Date of gift/sale</th>
<th>What was it worth?</th>
<th>How much did you get for it?</th>
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If you have given away or sold for less than its market value more than 3 items, attach a separate sheet with details.
17 You need to attach all documents that provide details about the work you have done to meet the work test (e.g. payment summaries, income tax returns, time sheets, completed work records or evidentiary certificates).

18 **IMPORTANT INFORMATION**

**Privacy and your personal information**
Your personal information is protected by law (including the Privacy Act 1988) and is collected by the Australian Government Department of Human Services for the assessment and administration of payments and services. This information is required to process your application or claim.

Your information may be used by the department, or given to other parties where you have agreed to that, or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which the department will manage your personal information, including our privacy policy, at humanservices.gov.au/privacy

19 **Statement**

I declare that:
- the information I have provided in this form is complete and correct.

I understand that:
- giving false or misleading information is a serious offence.
- 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.
- the Australian Government Department of Human Services can make relevant enquiries to make sure I receive the correct entitlement.

Your signature

Date / /