Application for Payment of a Death Benefit

ISSUED 24 MAY 2025
FUND ABN 68 964 712 340 | USI 68964712340018

Complete this form if you are a dependant of a deceased member of Verve Super or acting on behalf of the dependants of a deceased member of Verve Super, and you wish to apply for payment of a death benefit.

This form and accompanying documents must be posted to **Verve Super, GPO Box 2753, Brisbane QLD 4001**.

If you have any questions or need assistance in completing this form, please contact us on **1300 799 482** or **hello@vervesuper.com.au**.

Section 1: Personal Details of the Deceased Member

GIVEN NAME(S)

SURNAME

MEMBER NUMBER

DATE OF BIRTH (DD/MM/YYYY)

/ /

DATE OF DEATH (DD/MM/YYYY)

/ /

LAST RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Please enclose:

- A certified copy of the deceased member's ID (i.e., licence or passport).
- A certified copy of the deceased member's full Death Certificate.

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Section 2: The Claimant's Details

To be completed by the dependant or the person who is acting on behalf of the dependants of the deceased member.

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

*By providing your email address, you consent and authorise us to send you communications, including information required by law, in electronic format (email or similar technologies) whenever possible. You can elect to receive communications by post at any time by contacting Verve Super on **1300 799 482** or by email at **hello@vervesuper.com.au**.

Relationship to Deceased:

- ☐ SPOUSE/DE FACTO
- ☐ CHILD (INCL. ADULT OR ADOPTED)
- ☐ LEGAL PERSONAL REPRESENTATIVE
- ☐ FINANCIAL DEPENDANT
- ☐ INTERDEPENDENCY RELATIONSHIP
- ☐ NON-DEPENDANT NEXT OF KIN (E.G. MOTHER, SISTER, ETC.)

Legal Personal Representative (if applicable)

Complete this section if you want to give a person or company the authority to make enquiries and/or act on your behalf in respect of this claim. Select **one or both** of the following authorisations.

I authorise the person or company below to:

☐ MAKE ENQUIRIES ON MY BEHALF IN RESPECT OF MY CLAIM.

☐ PROVIDE DOCUMENTS AND LIAISE WITH THE FUND IN RESPECT OF MY CLAIM.

GIVEN NAME(S)

SURNAME

MOBILE PHONE

EMAIL ADDRESS*

COMPANY NAME (if applicable)

COMPANY PHONE NUMBER

COMPANY ADDRESS

SUBURB

STATE

POSTCODE

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Section 3: The Deceased Member's Family Details

Please complete the deceased member's family relationship details below as required.

Note:

- The claimant who completed Step 2 of this application may also be required to complete their details in Step 3 if relevant.
- If the details of additional person(s) need to be added, please print additional copies of this section and attach them to the application.

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RELATIONSHIP 1

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

☐☐ / ☐☐ / ☐☐☐☐

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

☐ SPOUSE/DE FACTO ☐ CHILD (INCL. ADULT OR ADOPTED) ☐ NON-DEPENDANT NEXT OF KIN (E.G. MOTHER, SISTER, ETC.)

Were they financially dependent on the deceased?

☐ YES ☐ NO

If this person is a non-dependant next of kin who was financially dependent on the deceased member at the time of their death, please explain why.

RELATIONSHIP 2

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

- [ ] SPOUSE/DE FACTO
- [ ] CHILD (INCL. ADULT OR ADOPTED)
- [ ] NON-DEPENDANT NEXT OF KIN (E.G. MOTHER, SISTER, ETC.)

Were they financially dependent on the deceased?

- [ ] YES
- [ ] NO

If this person is a non-dependant next of kin who was financially dependent on the deceased member at the time of their death, please explain why.

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RELATIONSHIP 3

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

- [ ] SPOUSE/DE FACTO
- [ ] CHILD (INCL. ADULT OR ADOPTED)
- [ ] NON-DEPENDANT NEXT OF KIN (E.G. MOTHER, SISTER, ETC.)

Were they financially dependent on the deceased?

- [ ] YES
- [ ] NO

If this person is a non-dependant next of kin who was financially dependent on the deceased member at the time of their death, please explain why.

Section 4: Those Who Consider They Are Financial Dependants or Interdependents of the Deceased

Please complete Step 4 if there is a person(s) who meets the definition of being a financial dependant or who had an interdependency relationship with the deceased member at the time of their death.

Please see the definitions of 'Financial dependant' and 'Interdependency relationship' in the **Important Information** section of this application.

Note:

- If the details of a person(s) have already been completed in Step 3, they do not need to be completed again in Step 4.
- The claimant who completed Step 2 of this application may also be required to complete their details in Step 4 if relevant.
- If the details of additional person(s) need to be added, please print additional copies of this section and attach them to the application.

*By providing your email address, you consent and authorise us to send you communications, including information required by law, in electronic format (email or similar technologies) whenever possible. You can elect to receive communications by post at any time by contacting Verve Super on **1300 799 482** or by email at **hello@vervesuper.com.au**.

For consideration to be given to an interdependency relationship, you must provide details of the circumstances of the relationship, including (where relevant):

- the duration of the relationship;
- the reputation and public aspects of the relationship;
- whether or not a sexual relationship existed;
- the degree of emotional support;
- the ownership, use or acquisition of property;
- the extent to which the relationship was one of mere convenience;
- the degree of mutual commitment to a shared life;
- the care and support of children;
- any evidence suggesting that the parties intended the relationship to be permanent (i.e., mortgage contracts, rental agreements, etc.).

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RELATIONSHIP 1

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

- [ ] FINANCIAL DEPENDANT
- [ ] INTERDEPENDENCY RELATIONSHIP

Please provide details of the financial dependency or interdependency relationship between the applicant and the deceased member at the time of their death. Please attach any additional relevant information to this application.

RELATIONSHIP 2

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

☐ FINANCIAL DEPENDANT ☐ INTERDEPENDENCY RELATIONSHIP

Please provide details of the financial dependency or interdependency relationship between the applicant and the deceased member at the time of their death. Please attach any additional relevant information to this application.

RELATIONSHIP 3

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

/ /

MOBILE PHONE

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

Relationship to Deceased:

☐ FINANCIAL DEPENDANT

☐ INTERDEPENDENCY RELATIONSHIP

Please provide details of the financial dependency or interdependency relationship between the applicant and the deceased member at the time of their death. Please attach any additional relevant information to this application.

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Section 5: The Deceased Person's Will

Did the deceased member leave a Will? ☐ YES ☐ NO

If 'yes', has probate been applied for/received? ☐ YES ☐ NO

If 'no', have Letters of Administration been applied for/received? ☐ YES ☐ NO

If you selected 'yes' to one or more of the questions above, please attach a certified* copy of the document.
*If the total death benefit is less than $1,000, the copy of the document does not need to be certified.

*By providing your email address, you consent and authorise us to send you communications, including information required by law, in electronic format (email or similar technologies) whenever possible. You can elect to receive communications by post at any time by contacting Verve Super on **1300 799 482** or by email at **hello@vervesuper.com.au**.

EXECUTOR 1

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

☐☐ / ☐☐ / ☐☐☐☐

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

SUBURB

STATE

POSTCODE

EXECUTOR 2

GIVEN NAME(S)

SURNAME

DATE OF BIRTH (DD/MM/YYYY)

☐☐ / ☐☐ / ☐☐☐☐

EMAIL ADDRESS*

RESIDENTIAL ADDRESS

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Section 6: Request to be Considered in the Payment of a Death Benefit

With reference to all of the persons listed in the preceding sections of this form, please list each person who wishes to be considered for payment of a death benefit in respect of the deceased member's Verve Super superannuation account.

Each person who was a nominated beneficiary or dependant of the deceased member, and who wishes to be considered for payment of a death benefit should complete the section below. Please copy this page to enable each person to complete their individual claim.

YOUR NAME

YOUR DATE OF BIRTH (DD/MM/YYYY)

☐☐ / ☐☐ / ☐☐☐☐

RESIDENTIAL ADDRESS

POSTAL ADDRESS

YOUR RELATIONSHIP TO THE DECEASED

DO YOU INTEND TO CLAIM A BENEFIT

☐ YES ☐ NO

If you answered **NO**, who do you think is entitled to this benefit and why?

If you answered **YES** above, please specify your bank account details so that payment can be enacted if the Trustee approves the payment of a benefit to you.

ACCOUNT NAME*

NAME OF FINANCIAL INSTITUTION

BSB

ACCOUNT NUMBER

*We generally only make payments into an Australian bank account that's in your name or held jointly in your name with another person.

Please provide a copy of your bank statement which is less than 12 months old, showing your account details and full name (transaction history can be redacted).

YOUR TAX FILE NUMBER*

You can find your TFN on statements you've received from the ATO, your super fund, your work payment summary, or alternatively you can contact the ATO on **13 28 61** for help finding it. We are authorised to ask for your TFN. You do not have to provide your TFN but if you don't, you may end up paying more tax than you need to. Further information can be found at www.ato.gov.au.

Section 7: Privacy

The personal information provided in this form is collected and used by Verve Super to manage the superannuation account of the deceased Verve member listed, process any relevant death benefits and to comply with the relevant legislation. If you do not provide the information requested, we may not be able to accurately manage the application and processing of this death benefit.

Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. For more information about how your personal information is handled, please view our Privacy Policy, or phone **1300 799 482** or email **hello@vervesuper.com.au**.

You can find detailed information about Verve Super in our **Product Disclosure Statement (PDS)**, **Target Market Determination (TMD)**, **How Verve Super Works Guide, Insurance Guide,** and **Financial Services Guide**, all of which can be obtained from **www.vervesuper.com.au** or on request by phoning **1300 799 482**.

Section 8: Statutory Declaration

The **claimant listed in Step 2** should complete this statutory declaration in the presence of an authorised witness, such as a Justice of the Peace. **Please use an original, 'wet' signature as digital signatures cannot be accepted.**

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this form are true in every particular.

DECLARED AT

THIS

DAY OF

IN THE YEAR

SIGNATURE OF CLAIMANT

BEFORE ME (PRINT NAME OF WITNESS IN BLOCK LETTERS)

SIGNATURE OF WITNESS

QUALIFICATION OF WITNESS

RESIDENTIAL ADDRESS OF WITNESS

SUBURB

STATE

POSTCODE

Section 9: Where to Send your Completed Form

This form and all applicable accompanying documents must be posted to:

Verve Super
GPO Box 2753, Brisbane QLD 4001

DOCUMENTATION CHECKLIST

The Trustee will not begin assessing your application until all of the following documents relevant to your application have been received:

1. Certified copy of the full death certificate
2. Certified ID for the deceased member
3. Certified copy of the deceased member's Will (if applicable)
4. Certified copy of the Probate (if applicable)
5. Certified copy of the Letters of Administration (if applicable)
6. Certified copy of a change of name document (if applicable)
7. Certified copy of Marriage Certificate or Divorce Certificate (if applicable)
8. If claiming as a de facto of the deceased member, evidence to confirm the relationship, such as a tenancy agreement, a utility notice or a joint bank account issued in both names (if applicable)
9. Certified copies of a Power of Attorney or Guardianship Orders (if applicable)
10. Certified copy of any minor child's Birth Certificate (if applicable)
11. Certified ID documents for each person making a claim (if applicable)
12. Supporting evidence or details for interdependency relationships (if applicable)
13. A copy of each person making a claim's bank statement showing account details and full name (transaction history can be redacted)

Verve SUPER

Application for Payment of a Death Benefit

Important Information

When a member of Verve Super dies, the Trustee must determine who is entitled to receive a death benefit. This decision is governed by the Superannuation Industry (Supervision) Act 1993, the Fund's Trust Deed and general trust law.

Who can claim a benefit?

A benefit may be paid to dependants of the member (as defined below) or a legal personal representative. As Trustee, we may pay the benefit to one or more persons, and to the exclusion of others, in such a manner and proportion as we determine. If we cannot find any dependants or a legal personal representative, then we may pay the benefit to a non-dependant (such as a next of kin).

Who can be a dependant?

For the purpose of paying a death benefit, a dependant can be:

1. A spouse of the member (including another person [whether of the same sex or different sex] with whom the member was in a relationship that is registered under a law of State or Territory; and a person who, although not legally married to the member, lived with the member on a genuine domestic basis in a relationship as a couple);
2. A child in relation to the member (including an adopted child, a stepchild and an ex-nuptial child [born outside the marriage] of the member; and a child of the member's spouse);
3. Any person with whom the member had an "interdependency relationship" at the time of the member's death;
4. Any person who, in the opinion of the Trustee, was at the date of the member's death wholly or partially dependant on that member; or
5. Any person who, in the opinion of the Trustee, had at the date of the member's death, a legally enforceable right to look to the member for financial support.

What is financial dependency?

Financial dependency may include a dependency on the member for payment of bills, rent, maintenance payments and shared financial commitments, such as a mortgage. Being financially dependent on the member does not necessarily mean that the dependant totally depended on the member for financial support.

What is an 'Interdependency Relationship'?

Two persons have an interdependency relationship if:

a. They have a close personal relationship; and

b. They live together; and

c. One or each of them provides the other with financial support; and

d. One or each of them provides the other with domestic support and personal care.

If each of these conditions is met, there is an interdependency relationship in place and each person is a dependant of the other.

In addition, if a close personal relationship exists but the other requirements above are not satisfied because of a physical, intellectual or psychiatric disability (e.g. one person lives in a psychiatric institution suffering from a psychiatric disability), then an interdependency relationship may still exist.

Who is a legal personal representative?

A legal personal representative is the person granted authority by the relevant State or Territory court to finalise the member's estate through either:

- Probate to act as an executor–where the member left a valid Will; or
- Letters of administration–where the member did not leave a valid Will.

How can death benefits be paid?

A death benefit may be paid to a dependant beneficiary as an income stream or a lump sum.

Important Information

What if the dependant is a minor or an infirm person?

A parent or guardian may complete an Application for Payment of a Death Benefit form on behalf of a child under age 18. The legal personal representative or attorney of an infirm person may complete an Application for Payment of a Death Benefit form on behalf of that person.

If the Trustee decides to pay a benefit to a child under age 18 or any other person lacking legal capacity, the benefit may be paid either to the parent of the child, to the beneficiary's legal personal representative or to a third party trustee for the maintenance, advancement, education or benefit of that person.

What are the rules for paying income streams to child beneficiaries?

In order to receive a death benefit in the form of an income stream a child must:

a. Be less than 18 years of age; or

b. Be less than 25 years of age and have been financially dependent on the deceased member; or

c. Have a disability that:
   - Is attributable to an intellectual, psychiatric, sensory or physical impairment or a combination of impairments;
   - Is permanent or likely to be permanent; and
   - Results in a substantially reduced capacity of the person for communication, learning or mobility and the need for ongoing support services.

Otherwise, the death benefit must be paid to the child as a lump sum.

If death benefits are paid to a child of any age in the form of an income stream, they must be cashed as a lump sum on the earlier of the day on which the:

- Income stream is commuted, and
- The day on which the child attains age 25, unless the child has a disability as described above.

What if the member made a non-binding death benefit nomination?

If the member made a valid non-binding death benefit nomination with the Trustee before their death, the Trustee will take this nomination into consideration in determining how the member's death benefit will be paid, but is not bound to follow it.

What if the member made a non-lapsing binding death benefit nomination?

If the member made a valid non-lapsing binding death benefit nomination with the Trustee before their death, and all nominated beneficiaries are alive at the time of the member's death, the Trustee will be bound by this nomination and will pay the member's death benefit in accordance with the nomination.

What tax is payable on death benefits?

Generally, for financial dependants of the deceased, no tax is payable on receipt of a lump sum death benefit. The taxation of income stream death benefits is complicated, and we recommend that you seek independent professional advice specific to your circumstances.

Proof of identity and certified copies

Wherever we request certified copies you must ensure that the documents you provide have been certified correctly by an approved person. For more information, see the **Providing Certified ID Factsheet** available from **www.vervesuper.com.au**.

Ensure your application is complete

To ensure your application is assessed as soon as possible, please ensure that you complete all fields on the application form and provide all requested documents. Any missing information and/or documents will result in the assessment being delayed while we request them again. If you are unsure or need clarification, please contact us on **1300 799 482** or **hello@vervesuper.com.au**.

Application for Payment of a Death Benefit

IMPORTANT - Under superannuation legislation, the Trustee is required to communicate details of its proposed payment to all potential beneficiaries. This means that a person's name and details of their relationship to, or dependence on, the deceased member may be disclosed to other claimants. It may also be disclosed to the Trustee's legal advisors and, if required, to the Australian Financial Complaints Authority (AFCA) or a court.

What steps are involved in the death claim process?

When Verve Super is advised about the death of a member, the Trustee must decide to whom a benefit should be paid. The steps are as follows:

1. An Application for Payment of a Death Benefit form is sent to the potential claimant/s.
2. Claimants will be requested to provide documentation relating to the deceased and minor children when lodging their claim. These include:
   a. Certified copy of the full death certificate
   b. Certified ID for the deceased member
   c. Certified copy of the deceased member's Will (if applicable)
   d. Certified copy of the Probate (if applicable)
   e. Certified copy of the Letters of Administration (if applicable)
   f. Certified copy of a change of name document (if applicable)
   g. Certified copy of Marriage Certificate or Divorce Certificate (if applicable)
   h. If claiming as a de facto of the deceased member, evidence to confirm the relationship, such as a tenancy agreement, a utility notice or a joint bank account issued in both names (if applicable)
   i. Certified copies of a Power of Attorney or Guardianship Orders (if applicable)
   j. Certified copy of any minor child's Birth Certificate (if applicable)
   k. Certified ID documents for each person making a claim (if applicable)
   l. Supporting evidence or details for interdependency relationships (if applicable)
   m. A copy of each person making a claim's bank statement showing account details and full name (transaction history can be redacted)
3. When the form and all documents have been received, we will consider to whom the benefit should be paid. This consideration will include a check to see whether the member made a valid non-lapsing binding death benefit nomination.
   If this is not applicable, we will:
   - Try to identify all the people who might have been dependants of the member; and
   - Examine each person's relationship with, and the extent to which they might have been financially dependent on, the member at the time of their death.
4. If there is no valid non-lapsing binding death benefit nomination, we will then determine how the benefit should be paid. This is based on considering:
   - Any Will left by the member and noting when it was written;
   - Any non-binding death benefit nomination made by the member;
   - The circumstances of each claimant or other potential beneficiary at the time the member died; and
   - All other relevant information obtained by us.
5. We will write to each person who has made a claim, informing them how it is proposed the benefit will be paid. If there is more than one person, the proposed distribution of the benefit will also be provided.
6. All claimants will be given 28 days to respond and inform us whether or not they agree with the proposal.
7. If no claimant objects to the proposal, the benefit will be paid or commence to be paid. In the case of a lump sum benefit, the benefit will consist of the proportion of the account balance less tax where applicable. If there is an objection to the proposal, we will review it; taking into account the objections and any additional information that is provided. We may also ask for further information to help in the review.
8. When we have considered the matter, we will make a further decision and repeat steps 5, 6 and 7 above. If a claimant remains dissatisfied with the final decision of the Trustee in relation to the distribution of a death benefit, the claimant may then make a complaint to the Australian Financial Complaints Authority (AFCA). Claimants will be informed of their rights in this regard at the same time as they are notified of the Trustee's determination.