

## When to use this form

Use this form if you are claiming Bereavement Allowance.

Bereavement Allowance is a short term income support payment that helps ease the adjustment to changed financial circumstances after the death of your partner.

It helps you by providing a level of income while you make funeral arrangements, settle financial affairs and arrange ongoing financial support.

To qualify, you must satisfy **relationship status** and **residence requirements**. The amount of allowance you receive will depend on your **income and assets** and other circumstances.

## What else you will need to provide

You will need to provide **proof of identity**. There is a complete list of acceptable documents in the ***Proving your identity*** form (SS231). If you do not have this form, go to our website [humanservices.gov.au/forms](http://humanservices.gov.au/forms)

## Filling in this form

- Please use black or blue pen.
- Print in BLOCK LETTERS.
- Mark boxes like this  with a ✓ or ✗.
- 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 all required questions are answered and that the form is signed and dated.

Return this form and any supporting documents to us **within 14 days** so we can process your application or claim. If you cannot do this **within 14 days**, contact us for extra time. If extra time is required, you must contact us at the earliest possible date to make an arrangement.

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

You can return this form and any supporting documents:

- online – submit your documents online. 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
- 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.

To establish your identity, you will be required to attend one of our Service Centres to provide original documents.

## Forms in your claim pack

In your claim pack, you should have the following:

- ***Claim for Bereavement Allowance*** form (SA366)
- ***Income and Assets*** form (SA369)
- ***Bereavement Allowance payment rates*** (C0039)
- ***Needing help after someone has died?*** (HD001)

## For more information

Refer to ***Information you need to know about your claim for Bereavement Allowance*** (Ci007) (**Information Booklet**) on our website

**humanservices.gov.au/bereavementallowance** or call us on **132 300** or visit one of our Service Centres.

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 apply – calls from mobile phones may be charged at a higher rate.

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.

**1** 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 3**  
Yes  *Go to next question*

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

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

**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**

**1** Other name  
  
Type of name (e.g. name at birth)

**2** Other name  
  
Type of name (e.g. maiden name)

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

**6** Your sex  
Male   
Female

**7** Your date of birth

**8** Your permanent address  
  
  
Postcode

**9** Your postal address (if different to above)  
  
  
Postcode

**10** Please read this before answering the following question.  
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 [humanservices.gov.au/em](http://humanservices.gov.au/em) or visit one of our Service Centres.

Your contact details  
Home phone number   
Is this a silent number? No  Yes   
Mobile phone number   
Fax number   
Work phone number   
Alternative phone number   
Email

**11** Have you ever claimed or received a Centrelink payment?  
No  **Go to 18**  
Yes  **Go to next question**

**12** What payment did you last claim or receive?

**13** Your Centrelink Reference Number (if known)  
 -  -  -



CLK0SA366 1412

**14** Questions 14 and 15 are optional and will not affect your payment. If you do answer, the information will help us to continue to improve services to Aboriginal and Torres Strait Islander Australians and Australian South Sea Islanders.  
Australian South Sea Islanders are the descendants of Pacific Islander labourers brought from the Western Pacific in the 19th Century.

Are you of Aboriginal or Torres Strait Islander Australian origin?

If you are of both Aboriginal and Torres Strait Islander Australian origin, please tick both 'Yes' boxes.

No

Yes – Aboriginal Australian

Yes – Torres Strait Islander Australian

**15** Are you of Australian South Sea Islander origin?

No

Yes

**16** Were you partnered to the deceased person immediately before they died?


No

Yes

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

No  *Go to next question*

Yes

 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 our website [humanservices.gov.au/nominees](http://humanservices.gov.au/nominees)

**18** Deceased partner's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**19** Had your partner 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*

**1** Other name

Type of name (e.g. name at birth)

**2** Other name

Type of name (e.g. maiden name)

If your partner had more than 2 other names, attach a separate sheet with details.

**20** Deceased partner's date of birth

/  /

**21** Deceased partner's date of death

/  /

 Attach an original death certificate.

**22** Are you pregnant?

Not applicable

No

Yes  Expected date of birth

/  /

**23** Have you remarried or entered into a de facto or registered relationship since the death of your partner?

No

Yes

**24** Please read this before answering the following question.

'Permanently' means you normally live in Australia on a long-term basis. Holidays or short trips outside Australia would not affect this.

Are you living in Australia **permanently**?

No

Yes

25 Have you lived or travelled outside Australia since 1 September 1994, including short trips and holidays?

The answer to this question may enable Human Services to access electronic records held by Australia's immigration department and help verify your Australian residence.

No  Go to next question


Yes  Give details below

Passport number

Country of issue

26 Are you an Australian citizen **who was born in Australia?**

No

 You will need to provide proof of your Australian residence status (e.g. **citizenship papers, passport or other documentation**).

▶ Go to next question

Yes  Go to 35

27 What is your country of birth?

28 When did you start living in Australia?

29 Did you start living in Australia before 1965?

No  Go to next question

Yes  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?

30 What is your country of citizenship?

Australia  Date granted

 ▶ Go to 31

Other  Country of citizenship

31 What type of visa did you arrive on?

New Zealand passport  Go to 33  
(special category visa)

Permanent  Go to next question

Temporary  Go to next question

Unknown (e.g. arrived on parent's passport)  Go to 33

32 Your visa details on arrival

Visa sub class

Date visa granted

33 Has your visa changed since you arrived in Australia?

No  Go to next question

Yes  Most recent visa details

Visa sub class

Date visa granted

34 Are you a refugee or former refugee?

No

Yes

35 Except for short trips or holidays, have you **EVER** lived outside Australia?

No  Go to next question

Yes  List **ALL** countries, **INCLUDING AUSTRALIA**, you have lived in **SINCE BIRTH**.

If you were born outside Australia, include the country where you were born.

**Include** the period(s) you have lived in each country.

**Do NOT include** short trips or holidays.

1 Country of residence	
<input type="text"/>	
From	To
<input type="text" value="/ /"/>	<input type="text" value="/ /"/>

2 Country of residence	
<input type="text"/>	
From	To
<input type="text" value="/ /"/>	<input type="text" value="/ /"/>

3 Country of residence	
<input type="text"/>	
From	To
<input type="text" value="/ /"/>	<input type="text" value="/ /"/>

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

**36** 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.

Name of bank, building society or credit union

Branch where the account is held

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

**37** 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 component/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

**38** 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 40

**39** Do you have a tax file number?

No  Please call us on **132 300**.

Yes  Your tax file number

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**40** 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.

Amount (must be in whole dollars)	Percentage (%) of taxable payment
<input type="text"/> \$ .00 per fortnight	<b>OR</b> <input type="text"/> % per fortnight

**41** Do you 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

42 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  **Go to 72**

In a home you own or you own jointly with another person, this can include:

- paying it off (mortgage)
- a caravan, transportable home or boat  **Go to 43**

In a hospital or home for people with disabilities  **Go to 64**

In a nursing home or aged care hostel  **Go to 47**

In a retirement village  **Go to 53**

In accommodation which you have the right to use for life  **Go to 56**

In public housing (e.g. housing owned by the Housing Authority. This does not include paying rent to a Community Housing organisation.)  **Go to 44**

In a place where you pay private rent (this includes site or mooring fees)  **Go to 61**

In a boarding house/hostel/private hotel  **Go to 64**

In accommodation where you pay no rent  **Go to 72**

Other (e.g. this could be where you do not have a fixed address)  Give details below

<b>Go to 61</b>

43 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 44 to 71. Go to 72**

Yes  **Go to 61**

44 Are you the primary tenant?

That is, your name is on the tenancy agreement (lease) with the public housing authority.

No  **Go to next question**

Yes  **Do not answer questions 45 to 71. Go to 72**

45 Does the primary tenant pay rent at the market rate?

No  **Go to next question**

Not sure  **Go to next question**

Yes  **Go to 62**

46 Do you live with the primary tenant(s) AND your income has been taken into account by the public housing authority when calculating the rent?

No  **Do not answer questions 47 to 71. Go to 72**

Yes  **Go to 62**

47 Name of aged care hostel/nursing home


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

	/		/	
--	---	--	---	--

49 How long will you be staying?

Long term or indefinitely  **Go to next question**


Respite care  When do you expect to leave?

	/		/	
--	---	--	---	--

**Do not answer questions 50 to 71. Go to 72**

50 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 to verify the details of the entry agreement for daily fees. **Go to next question**

Not sure  **Go to next question**

Yes  **Go to next question**

51 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?

\$



Attach the accommodation bond or the accommodation charge agreement.

52 Did you make a gift and/or loan in addition to the accommodation bond?

No  Go to 72

Yes  How much was the gift?

\$

How much was the loan?

\$

Go to 72

53 What date did you move into the retirement village?

54 Did you 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?

\$



Attach documents to verify the details of your entry contribution (e.g. your contract).

55 Did you make a gift and/or loan in addition to the entry contribution?

No  Go to 62

Yes  How much was the gift?

\$

How much was the loan?

\$

Go to 62

56 Did you 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 58

57 Tick which option describes how you obtained a life interest in a home without any exchange of money or transfer of assets:

Inherited the life interest  Go to 72

Have a formal agreement documenting your right to accommodation for life  Go to 72

Have an informal arrangement with children to live at their home and pay rent  Go to 61

Informal arrangement, no rent paid  Go to 72

Other  Give details below

Go to 61

58 What date did you make this payment/transfer?

59 Details of the payment/transfer

How much did you pay?

\$

AND/OR

What assets were transferred?

Market value of assets transferred?

\$

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

Full name (of the person or organisation)

Address

Postcode



**61** What type of accommodation do you live in?

- Private house or townhouse/unit/flat
- Community housing
- Defence housing
- Caravan/cabin/mobile home
- Boat
- Boarding house/hostel/private hotel
- Other

*Go to next question*

**Go to 64**

Give details below

**Go to next question**

**62** 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, fishermen, members of the armed forces).

Do you share your accommodation with other people?

No  **Go to next question**

Yes  Give details below

<b>1</b>	Person's name	Age
	<input style="width: 95%;" type="text"/>	<input style="width: 50%;" type="text"/>
	When did they move in? Relationship to you	
	<input style="width: 60%;" type="text"/> / <input style="width: 60%;" type="text"/>	<input style="width: 95%;" type="text"/>
	<b>Their share</b> of the rent/lodgings	Do they own the home?
	\$ <input style="width: 60%;" type="text"/> per	No <input type="checkbox"/> Yes <input type="checkbox"/>

<b>2</b>	Person's name	Age
	<input style="width: 95%;" type="text"/>	<input style="width: 50%;" type="text"/>
	When did they move in? Relationship to you	
	<input style="width: 60%;" type="text"/> / <input style="width: 60%;" type="text"/>	<input style="width: 95%;" type="text"/>
	<b>Their share</b> of the rent/lodgings	Do they own the home?
	\$ <input style="width: 60%;" type="text"/> per	No <input type="checkbox"/> Yes <input type="checkbox"/>

<b>3</b>	Person's name	Age
	<input style="width: 95%;" type="text"/>	<input style="width: 50%;" type="text"/>
	When did they move in? Relationship to you	
	<input style="width: 60%;" type="text"/> / <input style="width: 60%;" type="text"/>	<input style="width: 95%;" type="text"/>
	<b>Their share</b> of the rent/lodgings	Do they own the home?
	\$ <input style="width: 60%;" type="text"/> per	No <input type="checkbox"/> Yes <input type="checkbox"/>

<b>4</b>	Person's name	Age
	<input style="width: 95%;" type="text"/>	<input style="width: 50%;" type="text"/>
	When did they move in? Relationship to you	
	<input style="width: 60%;" type="text"/> / <input style="width: 60%;" type="text"/>	<input style="width: 95%;" type="text"/>
	<b>Their share</b> of the rent/lodgings	Do they own the home?
	\$ <input style="width: 60%;" type="text"/> per	No <input type="checkbox"/> Yes <input type="checkbox"/>

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

**63** Do you 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

**64** Do you pay board and/or lodgings?

Board means you are provided with some regular meals.  
Lodgings means no meals are provided to you.

No  ► **Go to 66**

Yes  ► **Go to next question**

**65** Can you separate the amounts you 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 67**

**66** How much do **you** pay per day, week, fortnight, 4 weeks or calendar month (e.g. rent, maintenance or site fees)?

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

\$  per

**67** When did you start paying this amount?

/  /

**68** Do you live in a boarding house, hostel, private hotel, hospital or disability housing?

No  ► **Go to next question**

Yes  ► **Go to 70**

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

\$  per

**70** Details of your landlord, authorised agent or person you pay rent to

Full name

Address

.....  
  
.....  
 Postcode

Contact phone number

(  )

**71** Do you have a current lease or tenancy agreement with written evidence of the **CURRENT** amount of rent, fees, lodgings or board and lodgings you pay?

No  ► **Go to next question**

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


**72** Please read this before answering the following question.

**Income and assets include:**

- savings and cheque accounts
- managed investments
- term deposits
- shares
- outstanding loans to other people
- bonds, debentures or unsecured loans
- motor vehicles, motor cycles or trailers
- boats, caravans and motor homes
- employment income
- pensions or payments from other organisations
- money from rent, boarders or lodgers
- real estate.

Do you have any income or assets?

No  ► **Go to next question**

Yes  ►  You will need to complete and attach an **Income and Assets** form (**SA369**).  
If you do not have this form go to our website **humanservices.gov.au/bereavementallowance**  
► **Go to next question**

**73** Which of the following forms, documents and other attachments are you 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 provide documents, please attach original documents.

Proof of identity

There is a complete list of acceptable documents in the **Proving your identity** form (SS231)

**Authorising a person or organisation to enquire or act on your behalf** form (SS313)

*(If you answered Yes at question 17)*

Deceased partner's original death certificate   
*(required at question 21)*

Proof of your Australian residence status   
*(If you answered No at question 26)*

Documents to verify the details of the entry agreement for daily fees   
*(If you answered No at question 50)*

Accommodation bond or the accommodation charge agreement   
*(If you answered Yes at question 51)*

Documents to verify the details of your entry contribution   
*(If you answered Yes at question 54)*

A full copy of your signed lease or tenancy agreement   
*(If you answered Yes at question 71)*

**Income and Assets** form (SA369)   
*(If you answered Yes at question 72)*

## 74 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 for the purposes of research, investigation or where you have agreed or it is required or authorised by law.

You can get more information about the way in which the Department of Human Services will manage your personal information, including our privacy policy at [humanservices.gov.au/privacy](http://humanservices.gov.au/privacy) or by requesting a copy from the department.

## 75 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.
- the Australian Government Department of Human Services can make relevant enquiries to make sure I receive the correct entitlement.
- I must tell the Australian Government Department of Human Services of any changes to this information **within 14 days**.

Your signature



Date

/ /