

Application for recognition of prior continuous service for superannuation purposes

This application form has been developed for active Revised, New, Transport, State Employees Retirement Benefits (SERB) or Melbourne Water Corporation Employees Superannuation (MWCES) Scheme members who are seeking additional prior continuous employment to be recognised as 'service' for benefit purposes.

Additional and Recognised service

Additional service refers to the period(s) of employment that you may have had before you became a member of ESSSuper.

Only service with Victorian State Government Authorities already covered by ESSSuper can be recognised by us for superannuation purposes. This includes full-time, part-time (i.e. working more than 40% of normal full time hours), temporary or exempt service.

Eligibility for Recognised service*

We can only recognise a period of additional service that:

- was continuous (for exceptions see 'Notes for Members'); and
- immediately preceded the date you became an 'officer'.

Revised Scheme members

Service may only be recognised if it was continuous (i.e. no breaks whatsoever). There is a cost to you for this additional recognised service. You are advised to carefully consider if it is in your best interest to purchase the additional recognised service as at some later stage the additional benefit (if any) may not be considered attractive when compared to the cost.

Consideration also needs to be given to whether it would be more advantageous for you to purchase the additional recognised service at the time of our approval letter or to wait until you are closer to leaving the Fund. In the latter instance, the actual amount of your final benefit is likely to be clearer although the purchase cost may be higher and there is the risk of you not being in a position to make a payment before ceasing to be an 'officer'.

New Scheme members

Service may only be recognised if it was continuous (i.e. no breaks whatsoever). If you became a member on the 1st July 1988, and you were not paying to, or eligible to pay to the SERB Scheme or the Hospitals Fund you may apply for your service to be recognised.

However, we will not recognise service if you were eligible to become an 'officer', or if you were eligible to become an 'officer' but were not granted 'officer' status (i.e. your employer

did not obtain the required Treasurer's Instrument). There is a cost to you for this additional recognised service.

Consideration needs to be given to whether it would be more advantageous for you to purchase the additional recognised service at the time of our approval letter or wait until you are closer to leaving the Fund.

SERB Scheme members

Service may only be recognised if you:

- had a break in service of no more than 6 months; and/or
- were employed for a minimum of 15 hours per week or 780 hours per year.

There is no cost to you for this additional service. However, after an application is processed an approval letter will be sent to you advising that the additional service has been recognised.

Transport Scheme members

Service may only be recognised if you:

- were working with a Transport Authority before 1 September 1978; and
- had a break in service of no more than 4 weeks.

There is no cost to you for this additional service. However, after an application is processed an approval letter will be sent to you advising that the additional service has been recognised.

MWCES Scheme members

Service may only be recognised if it was continuous (i.e. no breaks whatsoever). There is a cost to you for this additional service.

Processing your application

The first step in the process requires you to complete the 'Member Details' section of the *Application for Recognition of Prior Continuous Service for Superannuation Purposes (Form S211)*. You must then give this application to the employer agency in which your additional service occurred. An approved certifying officer from that employer agency will complete the 'Employment Details and 'Employer Certification' section and submit the application to ESSSuper.

Once we have received the completed form our service standard is to determine your eligibility and provide a written notification to you within 10 working days.

If your period of additional service is recognised, we will forward an approval letter to you. If applicable, the letter will contain a quotation amount for the period of the additional recognised service. The quotation is based on your salary and contribution rate at the date of the letter and is only valid for one month. If you choose not to pay the prior service quotation amount within that month, you will need to request a new quotation letter.

Prior Service payments

Our letter advising of any approval for recognition of prior service will contain details of how to pay for your approved prior service. We must receive that payment before the date you cease (i.e. resign or retire) to be an 'officer'.

Timing of applications and Prior Service payments

The employer certification of your application usually takes at least two weeks to finalise and our eligibility and notification process a further 10 working days. Given that, it is very important that you allow sufficient time when submitting your application, particularly if you are intending to cease employment or exit the Fund and if you wish to make a prior service payment before your cessation date.

We must receive a completed *Application for Recognition of Prior Continuous Service for Superannuation Purposes (Form S211)* and any subsequent payment for the cost of that service before the date you cease to be an 'officer'.

Seeking financial advice

Before submitting an *Application for Recognition of Prior Continuous Service for Superannuation Purposes (Form S211)* or a payment for recognised service we recommend that you seek independent financial advice to ensure you make the best decision to suit your individual circumstances.

ESSSuper has an arrangement with Link Advice Pty Ltd (AFSL 258145) to provide financial advice to ESSSuper members.

Personal financial advice is available on single superannuation topics such as choosing an investment option or retirement adequacy. Or if you're seeking more detailed advice we can also provide comprehensive advice on your entire financial position.

We cannot consider or recognise the following:

- Casual or Sessional service;
- Gratuities;
- Contract or Limited Tenure employment;
- Apprenticeships, Cadetships and Studentships;
- General nursing training at Public Hospitals (However, up to 3 years nursing training with the Office of Psychiatric Services or the Office of Intellectual Disability Services can be recognised);
- Service with the Commonwealth Government or another State Government;
- Service with Victorian State Instrumentalities covered by other Government Superannuation Schemes;
- Service of a married woman who was a non contributing permanent officer and declined to join the Fund during the 'amnesties' of 1975 and 1982;
- Service of a divorced woman who was a non contributing permanent officer and who did not accept the offer of entry to the New Scheme before 1 July 1988;
- Service where a person was a contributor to or eligible to contribute to the SERB Scheme; and
- Service while a member of a prescribed superannuation scheme i.e.
 - Any superannuation scheme or governing body of an authority that is established or constituted under an Act of Victoria or any state, the Commonwealth or Territory;
 - The Superannuation Scheme for Australian Universities;
 - The Allied Union Superannuation Trust;
 - The Building Union Superannuation Scheme;
 - The Tertiary Education Superannuation Scheme.

If you were a Vic Roads (formerly Road Construction Authority) employee, the number of years and months taken before commencing in the Fund will be deducted from any period of additional recognised service. This is because after attaining permanency, RCA employees were not obliged to join the Fund.

Contact us

For further information visit esssuper.com.au or call our Member Service Centre.

Proudly serving our members

This document is issued by Emergency Services Superannuation Board ABN 28 161 296 741 the Trustee of the Emergency Services Superannuation Scheme ABN 85 894 637 037 (ESSSuper). The information contained in this document is of a general nature only. It should not be considered as a substitute for reading ESSSuper's Product Disclosure Statement (PDS) that contains detailed information about ESSSuper products, services and features. Before making a decision about an ESSSuper product, you should consider the appropriateness of the product to your personal objectives, financial situation and needs. It may also be beneficial to seek professional advice from a licensed financial planner or adviser. An ESSSuper PDS is available at esssuper.com.au or by calling 1300 650 161.

ESSSuper Member Education Advisers and Financial Planners are authorised representatives of Link Advice Pty Ltd (Link Advice). Link Advice holds a current Australian Financial Services Licence No. 258145 and is responsible for the financial services provided to you. ESSSuper has an arrangement with Link Advice Pty Ltd to provide financial advice to ESSSuper members. ESSSuper pays Link Advice a fee for this service. Neither the Board, nor the Victorian Government, guarantee or endorse any recommendations made by Link Advice, or are responsible for the advice and actions of Link Advice.

Section 2 Employment Details and Employer Certification *(only to be completed by an approved certifying officer)* cont.

Was the contributor eligible to be a member of another Fund? Yes No

If so, which fund?

Has the contributor ever received a refund of contributions upon resignation from the State Superannuation Fund (or Resignation Benefit)? Yes No

Was the contributor a permanently employed married woman who was eligible to join the Fund under the 'amnesties' in 1975 or 1982? Yes No

Date of permanency / /

Road Construction Authority Employees Only

When was the contributor first offered membership of the ESSSuper? / /

When did he/she elect to join the fund? / /

Section 3 Certification

The relevant employer representative is to complete this section. The employer **does not** need to complete a *Member Details Advice Form (S511)*. Certification must be made by the approved certifying officer within the employer agency.

Date form S211 received / /

Name of Certifying Officer

Position title

Telephone (business hours) ()

Email address

Signature

Date / /

Please forward this completed form to
 ESSSuper GPO Box 1974, Melbourne Vic 3001
 T 1300 655 476 | F 1300 766 757 | esssuper.com.au

At ESSSuper, we treat the privacy and confidentiality of our members' personal information seriously. We are committed to complying with the guidelines of the *Privacy and Data Protection Act 2014* and the *Health Records Act 2001 (Vic)*. To obtain a copy of ESSSuper's privacy policy go to our website at esssuper.com.au