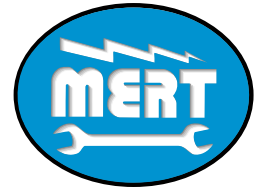


MERT Redundancy Benefit Claim



Please complete all sections in **black ink** using **BLOCK** letters and send to:
MERT Administration, Locked Bag 20, Parramatta NSW 2124 or email mertadmin@as.com.au

Section A: Employer to complete Note: Delays will occur if Section A is not completed by the employer.

Company Name	
<input type="text"/>	
MERT Employer Number	Employer's Telephone Number
<input type="text"/>	<input type="text"/>
Terminated employee details	
Employee's Name	
<input type="text"/>	
Commencement Date (dd/mm/yyyy)	Termination Date (dd/mm/yyyy)
<input type="text"/>	<input type="text"/>
I hereby certify that the member/employee ceased employment on the above date.	
Signature of Employer/Authorised Person	
<input type="text"/>	Date (dd/mm/yyyy)
<input type="text"/>	<input type="text"/>

Section B: Member/Employee to complete

Membership Number	Date of Birth (dd/mm/yyyy)	Telephone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Tax File Number	Note: Providing your Tax File Number is voluntary. However, failure to do so, will result in the Fund Administrator deducting the highest marginal tax rate.	
<input type="text"/>		
I, Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
of, Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Email Address		
<input type="text"/>		
hereby request payment of: <input type="checkbox"/> Full payment of my benefit OR <input type="checkbox"/> Part payment \$ <input type="text"/> , <input type="text"/> (before tax)		
Payment is to be:		
<input type="checkbox"/> directly into my bank account (details below) <input type="checkbox"/> paid by cheque and posted to my above address <input type="checkbox"/> rolled over (details over page)		
NOTE: Please provide a copy of your Bank Statement or Deposit Slip showing your Name, BSB and Account Number if you want payment by direct deposit. If not received, a cheque will be posted to you.		
Six digit Branch BSB Number	Account Number	
<input type="text"/>	<input type="text"/>	
Account Name		
<input type="text"/>		
Bank/Building Society	Branch/Suburb	
<input type="text"/>	<input type="text"/>	
Signature of Employee		
<input type="text"/>	Date (dd/mm/yyyy)	
<input type="text"/>	<input type="text"/>	

Section B: Member/Employee to complete (continued)

Rolled over to another Approved Worker Entitlement Fund only (details below)

Name of Fund

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Suburb / Town

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

State

--	--	--	--	--

Postcode

--	--	--	--	--	--	--	--	--	--	--	--	--	--

Information - to assist employers/members in completing the benefit claim form

Definition of Redundancy

“Redundancy” means the termination or cessation of employment of an employee for any reason.

“Redundancy payments” are those paid by an employer that an employee is legally entitled to receive on termination as prescribed by the relevant award or enterprise agreement, or the amount the employer has contributed to MERT whichever is greater. Redundancy payments can only be claimed on termination of employment.

Employer

Section A: Is to be fully completed by the employer, before the form is given to the member.

Employee Entitlement:

Upon redundancy the employee is legally entitled to receive a redundancy payment, as prescribed by the relevant award or enterprise agreement (whichever is applicable) or the amount that the employer has contributed into MERT, whichever is the greater amount. To ensure employees receive their legal entitlement, please complete the following:

- Employee’s entitlement as provided for under an award or enterprise agreement (A) \$
- Amount of redundancy contributions made to MERT on behalf of the employee (B) \$
- Balance or amount outstanding **(Deduct (B) from A)** (C) \$

Where the amount at (C) is nil then the employer has no payment to make to the employee. If the amount shown at (A) is greater than the amount shown at (B) then the employer is required to pay the employee the difference, being the amount shown at (C). The employee will receive the amount in (B) directly from MERT.

Member

Section B: Is to be completed by the member/employee.

Note: The member/employee needs to make a decision on termination, as to whether he/she wishes to claim their full entitlements, or only part of their entitlement. Circumstances surrounding payment may affect options, ie, previous employer rollover not applicable. Please contact the Fund Administrators for more information. This section also allows nomination of payment method, ie, cheque or electronic fund transfer.

Payment

Payment will be processed by the Fund Administrators, within 5 business days of the completed claim form being received, either by cheque or electronic fund transfer, whichever method of payment is nominated.

NOTE: If requesting payment to be paid directly into your bank account a copy of your bank statement or a Preprinted personalised deposit slip that has been issued to you showing Name of account holder, BSB and Account number must be supplied.

Lodgement of Claim Form

The completed claim form is to be returned to the Fund Administrators. This claim form can be sent by fax emailed or posted to the address listed below. A copy of the Separation Certificate from the employer, Long Service Leave Certificate, Group Certificate, your current income statement for benefits from Centrelink or documentation from a third party confirming your termination is to be attached to claim form.

Applicable Taxation

Redundancy payments paid on termination are classified as Eligible Termination Payments (ETPs). ETPs are subject to the following tax rates, (plus Medicare levy) which will be deducted by the Fund Administrators upon payment of the benefit.

- Preservation Age and over 15% (up to the threshold) plus Medicare Levy
- Under Preservation Age 30% plus Medicare Levy

Your Preservation Age is shown in the Table below:

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
From 1 July 1964	60

The relevant Age is your Age at the end of the financial year you receive your benefit.

Rollover of ETPs

Changes to Rollover of ETP's came into effect from 1/7/2012. ETP Rollover to superannuation option is no longer permitted.