



MORTALITY BENEFIT POLICY

POLICY/PROCEDURE	MBP-01
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Policy as attached

Policy reviewed by:

- Policy & Strategic Development Committee14 April 2000**
- Policy, Planning & Direction Sub Committee 23 November 2003**
- Policy, Planning & Direction Sub Committee 20 August 2006**
- Management Team12 February 2019**

Policy endorsed by

- Executive 21 April 2000**
- ExecutiveDecember 2003**
- Executive 18 September 2006**
- ExecutiveFebruary 2010**
- Executive May 2012**
- Executive 18 February 2019**

Policy amended:

- January 2002**
- January 2004**
-September 2006**
- May 2012**
- February 2019**

Policy review date:..... 2022

Mortality Benefit Policy



New South Wales Local Government,
Clerical, Administrative, Energy,
Airlines & Utilities Union

Notes:

The Mortality Benefit Policy has now been in operation since 1996 and numerous applications for payment have been received and processed.

At the Union's 1998 Annual Conference and at the 2001 Annual Conference delegates resolved to adopt an amended policy incorporating various alterations made to the Union's procedures since the introduction of the benefit in 1996.

Benefits are payable upon presentation of proof, that the applicant has made arrangements for the deceased members funeral accompanied by a receipt or account from the Funeral Director. When provided by way of an account the cheque shall be made out to and paid directly to the Funeral Director.

The intention of the policy is to provide a means of relieving financial distress at a time of need. We have continued to minimise the administration processes associated with the policy to enable benefits to be made available when they are most needed to assist with funeral expenses.

Enclosed for your information is a copy of the policy. Application forms can be obtained from the Union's head office. Please direct all enquiries to the Membership Supervisor.

The USU Mortality Policy is a service that enables Union members to support each other through the combined strength of their Union membership.

Graeme Kelly OAM
GENERAL SECRETARY

Please post application to:

**United Services Union
Level 7 321 Pitt Street Sydney 2000**

or fax to: 9261 3378

New South Wales Local Government, Clerical, Administrative, Energy, Airlines & Utilities Union

Mortality Benefit Policy

1. Should a member die who is a financial member as at the date of death and has been a financial member in accordance with the provisions of Rule 18, for a period of at least two years prior to the death, then an application may be made to the Union for a Mortality Benefit.
2. A claim for a Mortality Benefit must be made within six months of the date of the member's death.
3. The benefit shall be paid to an applicant upon the presentation of proof that such applicant has made arrangements for the deceased member's funeral accompanied by a receipt or account from the Funeral Director. When provided by way of an account (invoice or statement) the payment shall be made out to and paid directly to the Funeral Director.
4. In accordance with Union practices and to ensure the fast and effective payment, the Union prefers to make payment to a bank account ie via electronic funds transfer where possible.
5. Where a claim does not meet policy in part or all requirements of this Policy, the Executive of the Union shall have the discretion to accept or decline benefit. Nothing in this policy prohibits the Executive of the Union granting a special application for payment of the benefit.
6. The amount per member payable shall be \$2500; however, a pro rata of this amount may be paid by direction from the Executive.
7. The amount payable will be reviewed and determined in accordance with the ability of the Union to meet the payments.
8. The policy does not extend to life members or retired members of the Union as per Executive direction December 2000.
9. The Executive of the Union reserves the right to vary, amend or rescind this policy at its discretion.

I(Applicants Full Name)
 make application for the payment of a Union Mortality Benefit. I submit the
 following information in support of the application:

Applicant			
Address			
		Post Code	
Phone			
<u>Relationship to Deceased</u>			

Deceased	
Full Name	
Union Membership Number	
Years as Union Member	
Employer	
Date Employed	
Date of Death	

I attach herewith a copy of a

<input type="checkbox"/> Statutory Declaration	<input type="checkbox"/> Receipt for Funeral Expenses
<input type="checkbox"/> Death Certificate	<input type="checkbox"/> Bank Details

Signed: Applicants Signature

Date:

OFFICE USE ONLY

Membership Date Joined:

Delegate Date:

Statutory Declaration Receipt for Funeral Expenses

Death Certificate

Payment Authorised: Date:

Deleted from Membership System: Officer: Date:

STATUTORY DECLARATION

USU Mortality Benefit

I, (applicant’s name)

of (applicant’s address)

In the State of New South Wales do solemnly and sincerely declare as follows:

- 1. I refer to my application to the United Services Union for payment of a Mortality Benefit arising out of the death of (deceased’s name) on (date of death).
- 2. a. I make application for the payment of the benefit on the basis that I paid for the deceased’s funeral as per the attached receipt or account from the Funeral Director.
 b. When provided by way of an account the payment shall be made out to and paid directly to the Funeral Director.
- 3. I acknowledge that payment of the mortality benefit is made at the discretion of the Union in accordance with the criteria identified in the Union’s Mortality Benefit Policy.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the “Oaths Act of 1900-1953”.

Subscribed and declared at)
 This day of)
 On Two Thousand and)
 before me)

.....
Applicant

.....
Justice of the Peace / Solicitor

.....
JP Number

Name and Address of Applicant:

Banking Institution:.....

Name of Bank Account:.....

Branch Name:.....

Branch Number: _ _ _ _ - _ _ _ _ - _ _ _ _

Account Number: _____