

Pension Establishment Request

The Trustees of the superannuation fund advise that a Resolution has been made to commence a pension for the member from the pension commencement date enclosed.

We, the Trustees, instruct you to prepare the appropriate documentation to establish the pension in accordance with the Trustees resolution.

Pension Establishment Details

Superannuation Fund Name _____

Member Name (pension recipient) _____

Pension Commencement Date _____ / _____ / _____

Member Tax File Number

Is the Member Claiming the tax free threshold? Yes No N/A (60+)

Use full member balance to commence pension? Yes No

If No, amount used to commence pension (\$0.00): _____

Is the member intending to claim any member concessional (deductible) contributions within the financial year prior to commencing a pension? Yes No

Condition of Release

Attained Age 65

Termination of Employment (Aged 60-64)

Permanent Retirement (Aged 55-64)

Pre Retirement Pension (Aged 55-64)

Aged 60 and ceased gainful employment

Other _____

Is the pension to be reversionary? Yes No

(ie continue to be paid as a pension to the nominated beneficiary upon death)

Name of Reversionary Beneficiary _____

Relationship with the Member _____

Reversionary's Date of Birth _____ / _____ / _____ Gender Male Female

Adviser Details

Adviser Name _____ Tel _____

Trustees' Authority

Trustee Name _____

Signed _____ Date _____