

Pension Consolidation Request

The trustees of the superannuation fund request to stop and restart a pension for the member from the pension details below.

The trustees instruct you to prepare the appropriate documentation to stop and restart the pension.

Fund and member details

Superannuation Fund Name

Member Name (pension recipient)

Pension Consolidation Details

Pension Consolidation Date / /

Use full member balance to commence a new pension? Yes No

If No, amount used to commence pension \$

Existing type of pension being commuted: Non-retirement pension Retirement pension

Full commutation (entire balance)

Partial commutation; please specify the amount \$

For multiple pension accounts, specify the order of commutation:

Lowest to highest tax-free percentage

Oldest to newest pension

Specific order of priority

Pension Account Tax Free %

Have you met the minimum pro-rata pension payment?

Yes No

Not applicable (if commutation date is 1 July)

Full commutation – The amount paid must be at least the pro rata of the minimum annual payment amount.

Partial commutation – The trustee will need to ensure that they have already satisfied the minimum pension requirements, or that sufficient assets remain to meet the minimum pension payment standards for that year, based on the original value of that income stream.

Is the member intending to claim any member concessional (deductible) contributions within the financial year prior to commencing a pension?

Yes No

Is the member currently in receipt of any other pension/s from another superannuation fund?

Yes No

If Yes, amount of transfer balance account from another superannuation fund?

\$

If Yes, can the member confirm that the new pension will not cause the member to exceed their Personal Transfer Balance Cap?

Please also provide a copy of your Transfer Balance Account history from MyGov.

Yes No

Is the member currently in receipt of the Australian Age Pension or Commonwealth Seniors Health Card?

Yes No

If Yes, has the member sought advice on the implications of the new pension? (We strongly recommend you seek advice)

Yes No

Condition of Release

- Attained Age 65
- Termination of Employment (Aged 60-64)
- Permanent Retirement (Aged 55-64)
- Pre-Retirement Pension
- Aged 60 and ceased gainful employment
- Others. Please specify

Is the pension to be reversionary? (ie continue to be paid as a pension to the nominated beneficiary upon death) Yes No

Name of Reversionary Beneficiary

Relationship with the Member

Trustee 1:		Trustee 2:	
Signed:	Date: / /	Signed:	Date: / /
Trustee 3:		Trustee 4:	
Signed:	Date: / /	Signed:	Date: / /
Trustee 5:		Trustee 6:	
Signed:	Date: / /	Signed:	Date: / /

or

Adviser Authority

Adviser:
Signed: Date: / /