

# Pension Establishment Request



The trustees of the Superannuation Fund detailed below hereby request SuperGuardian to prepare the necessary documentation for the commencement of a pension for the Member detailed below.

By signing this form, the trustees acknowledge and accept SuperGuardian's pension commencement fee, as outlined in the fee schedule.

## Pension Establishment Details

Superannuation Fund Name \_\_\_\_\_

Member Name (pension recipient) \_\_\_\_\_

Pension Commencement Date \_\_\_\_\_

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: \$ \_\_\_\_\_

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, can the member confirm that the new pension will not cause the member to exceed their Personal Transfer Balance Cap?      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 (Between preservation age - 64)

Pre-Retirement Pension (Between preservation age - 64)

Other \_\_\_\_\_

Is the pension to be reversionary?

YES

NO

Name of Reversionary Beneficiary: \_\_\_\_\_

Relationship with the Member: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

### Member Authority

Signed by the requesting member.

**Member:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

### Trustee Authority

**Trustee 1:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee 3:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee 5:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee 2:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee 4:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee 6:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

or

### Adviser Authority

**Adviser:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_