

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 _____

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 (preservation age-age 64)

Pre Retirement Pension (preservation age-age 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 _____