

## New Pension Instructions

### YOUR DETAILS

Date	
Name	
Company Name	
Street Address	
Billing Address (if different)	
Telephone	
Fax	
Email	

Authorised by: \_\_\_\_\_

Signature: \_\_\_\_\_

## Account Based Pension – Ordinary & Transition to Retirement

### 1. Fund Details

Detail	Instruction	Comments
Name of Fund		
ABN of Fund		
Name and address of Trustee(s)		<p>Include names of directors of corporate trustee</p> <p>Include name of each trustee if individual trustees</p>
Provision of Governing Rules permitting payment of pension		Quote SC Number if the Super Fund is on SUPERCentral
Name of all Members		Provide name of all current members

## 2. Pensioner Member Details

Detail	Instruction	Comments
Name of Pensioner Member		Full name of the member
Date of Birth of Pensioner Member		
Pension Entitlement Condition		<p>For <b>ordinary</b> pensions – this will be “reached age 65” or “retired and reached preservation age” or “permanently incapacitated”</p> <p>For <b>transition</b> to retirement pension – this will be “reached preservation age but not retired and not attained age 65”</p>

## 3. Pension Type

Detail	Instruction	Comments
Ordinary Pension		
Transition to Retirement Pension		<p>Generally this type of pension cannot be cashed out to a lump sum until the member reaches age 65 or retires</p> <p>This type of pension can be “rolled” back in whole or part to accumulate phase</p> <p>Once member reaches age 65 or retires - this pension becomes an ordinary pension</p>

**4. Pension Details**

Detail	Instruction	Comments
Commencement Date		Cannot have commencement before the start of the current financial year
Initial Pension Account Balance		The pension account balance cannot be added to by way of contributions or rollovers after commencement
Tax Free Component of the Superannuation Interest		The tax free component must be apportioned between the amount of the superannuation interest taken as a pension and the amount of the superannuation interest (if any) which is not taken as a pension
Will the Initial Pension Account Balance represent the member's entire superannuation interest?	YES or NO If No – what is the % or dollar amount of the superannuation interest which is not to be taken as a pension?	Disregard any amount which is already been taken as a pension.  Amount of the Superannuation interest not taken as a pension will continue
Is the Pension to be Reversionary?	YES or NO	
Payment Terms	Annual Pension Amount: \$ _____ Minimum Statutory Amount Period: Monthly Quarterly Half-yearly Annually Timing: In arrears In advance Other _____ Payment in period 1 June to 30 June: June: YES or NO	Irrespective of specified amount – minimum statutory amount must be paid in respect of each financial year

## 5. Reversionary Beneficiary Details

Detail	Instruction	Comments
Name of Reversionary Beneficiary		
Relationship with Pensioner	Spouse    Child Financial dependant Interdependency relationship	
Date of Birth		
Current Residential Address		
More than one reversionary beneficiary	YES or    NO	If yes, please provide full details

## 6. Asset Segregation Options

Detail	Instruction	Comments
Segregation Option	None    Partial    Complete	Asset segregation cannot be retrospective
Assets to be segregated		Assets must be specifically identified E.g. if cash – provide bank account number If property – provide title reference and address

**7. Adviser Details**

Detail	Instruction	Comments
Name of Adviser		
Name of Firm/Company		
Contact Details		
Postal Address  Office Address		

**8. Applicable Charges**

Pension Type	Commencement	Our Fees (incl GST)
Ordinary Account Based Pension	Pension Commencement Date after signing SUPERCentral deed	\$220.00
	Pension Commencement Date before signing SUPERCentral deed (if any)	\$385.00
Transition to Retirement Pension	Pension Commencement Date after signing SUPERCentral deed	\$220.00
	Pension Commencement Date before signing SUPERCentral deed (if any)	\$385.00

