

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 ordinary pensions – this will be “reached age 65” or “retired and reached preservation age” or “permanently incapacitated”</p> <p>For transition 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?	<input type="checkbox"/> YES or <input type="checkbox"/> 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?	<input type="checkbox"/> YES or <input type="checkbox"/> NO	
Payment Terms	Annual Pension Amount: <input type="checkbox"/> \$ _____ <input type="checkbox"/> Minimum Statutory Amount Period: <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half-yearly <input type="checkbox"/> Annually Timing: <input type="checkbox"/> In arrears <input type="checkbox"/> In advance <input type="checkbox"/> Other _____	Irrespective of specified amount – minimum statutory amount must be paid in respect of each financial year

	Payment in period 1 June to 30 June: <input type="checkbox"/> YES or <input type="checkbox"/> NO	
--	--	--

5. Reversionary Beneficiary Details

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

6. Asset Segregation Options

Detail	Instruction	Comments
Segregation Option	<input type="checkbox"/> None <input type="checkbox"/> Partial <input type="checkbox"/> 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

