

Account Based Pension Reset

Please attach a copy of the Funds Current Trust Deed to your order, then
Fax or Email this completed form to Super Registry:
Fax: (03) 8256 0108 / Email: info@superregistry.com.au

Contact Details:

Advisor Name:

Advisor Company:

Postal Address:

Phone: Email:

Payment Details:

Enclosed is payment for an Account Based Pension Reset for \$330.00

Direct Deposit* Cheque

***If you would like to pay via Direct Deposit, please forward your order to our office first, and we will email you an invoice with our bank account details for payment.**

Fund Details:

Name of Fund:

Address of the meetings of the Trustees/Members

Trustee Details (if a Corporate Trustee):

Company Name:

Company ACN:

Registered address:

Company Chairman:

Trustee Details (if individual Trustees):

Trustee Names:

..... Individual trustee or Director
..... Individual trustee or Director
..... Individual trustee or Director
..... Individual trustee or Director

Member receiving Pension:

Member Name:

.....

Address:

.....

Date of Birth:

/ /

.....

Gender:

.....

Eligible Service Date:

/ /

.....

Tax File Number:

.....

Pension Details:

Pension Reset Date:

/ /

.....

Pension Purchase Price:

\$

.....

What pension/s is the Member commuting?

- Account Based Pension
- Transition to Retirement Pension
- Allocated Pension
- Transition to Retirement Allocated Pension

Is the Member receiving the pension:

- confirming prior instructions to commence the pension
- instructing the trustee as of the date the documents are signed to commence the pension

Is the **current pension** a Transition to Retirement Pension?

YES

NO

Is the **new pension** a Transition to Retirement Pension?

YES

NO

If the new pension is **not** a Transition to Retirement Pension, what Condition of Release has the Pensioner met to be eligible to receive the Pension?

- has an unrestricted non-preserved component
- has reached preservation age, ceased employment & doesn't intend to ever take up employment for more than 10 hours per week
- has reached age 60 and terminated their most recent employment
- is age 65 or over
- is permanently incapacitated
- has a terminal medical condition

At what Frequency will the Pension Payments be made? WEEKLY MONTHLY QUARTERLY YEARLY

