

Conversion of an existing Allocated Pension to an Account Based Pension

Contact Details:

Advisor Name:

Advisor Company:

Postal Address:

Phone: Email:

Payment Details:

Enclosed is payment for an Allocated Pension Conversion 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):

Name:

Company ACN: - -

Registered address:

Director Names:

Company Chairman:

Trustee Details (if individual Trustees):

Trustee Names:

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Member receiving Pension:

Member Name:

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Address:

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Date of Birth:

/ /

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Gender:

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Eligible Service Date:

/ /

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Tax File Number:

- -

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Pension Details:

Date the **existing** Allocated Pension Commenced:

/ /

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Date you would like the **new** Allocated Pension to Commence:

/ /

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Is the existing Allocated Pension a Transition to Retirement Pension?

YES

NO

Will the new Account Based Pension be a Transition to Retirement Pension?

YES

NO

New Account Based Pension Purchase Price: \$

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Is the Tax Free Threshold being claimed?

YES

NO

At what Frequency will the Pension Payments be made? WEEKLY

MONTHLY

QUARTERLY

YEARLY

Pension Reversionary:

Are you nominating a reversionary for the pension?

YES

NO

Reversionary Name:

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Address:

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Date of Birth:

/ /

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Relationship to Pensioner:

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Pension Purchase Components:

Enter the details of the existing Allocated Pension balance to be transferred into the Account Based Pension:

For Pensions where the Member is 60 years or older, or a partial commutation has occurred:

Tax Free Component – Contributions segment	\$
Tax Free Component – Crystallised segment	\$
Taxable Component	\$
TOTAL PENSION PURCHASE PRICE	\$

For Pensions where the member is under 60 years of age, and no partial commutation has occurred:

Post 30/6/1994 Invalidation Component	\$
CGT Exempt Component	\$
Concessional Component	\$
Undeducted Component	\$
Pre and Post	\$
TOTAL PENSION PURCHASE PRICE	\$

Additional information:

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Please attach a copy of the Fund’s 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