



# SUPERANNUATION FUND PENSION PACK ORDER FORM

NAME: .....

FIRM: .....

PHONE: .....

E-MAIL: .....

FREECALL 1800 773 477

## FUND DETAILS

Name of Fund \_\_\_\_\_  
\_\_\_\_\_

## TRUSTEES AND MEMBERS

### Corporate Trustee Details (if applicable)

Company Name \_\_\_\_\_ ACN \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

ALL Directors are Members  YES or  NO      ALL Members are Directors  YES or  NO

(if NO, provide) Full Name \_\_\_\_\_  DIRECTOR  SECRETARY

#1 Full Name \_\_\_\_\_  
Address \_\_\_\_\_  
Role/s Held  INDIVIDUAL TRUSTEE  MEMBER

#2 Full Name \_\_\_\_\_  
Address \_\_\_\_\_  
Role/s Held  INDIVIDUAL TRUSTEE  MEMBER

#3 Full Name \_\_\_\_\_  
Address \_\_\_\_\_  
Role/s Held  INDIVIDUAL TRUSTEE  MEMBER

#4 Full Name \_\_\_\_\_  
Address \_\_\_\_\_  
Role/s Held  INDIVIDUAL TRUSTEE  MEMBER

PLEASE COMPLETE A *PENSION SCHEDULE* FOR EACH MEMBER THAT IS TO RECEIVE A PENSION PACK (see attached)

**PAYMENT DETAILS:** Please debit the following card details by the amount of \$ \_\_\_\_\_

TYPE OF CARD: Visa  Mastercard  \*Diners Club  \*Amex  \* 3% surcharge applies.

CARD NUMBER: \_\_\_\_\_ EXPIRY DATE: ( / )

NAME ON CARD: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

Please return the Form on FREEFAX 1800 655 556 or call with any queries.

## PENSION SCHEDULE

Member Name: \_\_\_\_\_

Date of Birth    \_\_\_\_/\_\_\_\_/\_\_\_\_

Amount of member's account balance to be used to fund pension:

EITHER:-                    \_\_\_\_\_ % of account balance

OR:-                    \$ \_\_\_\_\_ *From account balance*

Pension Commencement Date:    \_\_\_\_/\_\_\_\_/\_\_\_\_

**Is this Pension a Transition to Retirement Pension?**     YES     NO

A Member from age 55 can commence a pension before they retire, however, until they retire or reach 65 years of age (whichever comes first), the payments in a year (including payments made under a Splitting Order must not be larger in total than their Account Balance x 10%

Current Account Balance details:

Tax-Free Component:            \$ \_\_\_\_\_

Taxable Component:            \$ \_\_\_\_\_

**TOTAL:**                            \$ \_\_\_\_\_

**Is there a Reversionary Beneficiary?**     YES     NO

The pension may continue to be paid to a spouse, or a child of the beneficiary if the child:

- is less than 18 years of age; or
- is greater than 18 years of age, but less than 25 years of age and is financially dependent on the Member; or
- has a disability of the kind described in subsection 8(1) of the *Disability Services Act 1986*.