



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

Beneficiary Name: _____

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*.