

Pension Establishment Form

Full Name of Pension Member: _____

Super Fund Name: _____

Account Based Pension (ABP) Yes / No

Transition to Retirement Income Stream (TRIS) Yes / No

Centrelink Schedule Required Yes / No

A separate order form must be completed for each pension.

Super Fund and Member Details – Only required if we do not already administer the fund	
Super Fund TFN	
Super Fund ABN	
Trustee(s) of Super Fund Individual's names OR Corporation Name & Director(s)	
Date of Establishment of Super Fund	
Address of Trustee meetings	
Member's Date of Birth	
Member's TFN	
PENSION DETAILS	
Pension commencement date (Best to be the 1 st of any month)	
Has the pension member permanently retired	Yes / No
Is the full members accumulation account to be used	Yes / No
- If No, please specify the commencement account balance	\$
Reversionary Beneficiary - Full Name of spouse (if reversionary) - Spouse's Date of Birth	Yes / No
Minimum Pension Payment - OR Specific annual pension income	Yes / No \$
Frequency of Pension Payments	Mth / Qtr / Annual

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The default position is to run the fund as Unsegregated unless specified to be Segregated	
Is the Fund to be Segregated:	Yes / No
Is the Fund to be Un-Segregated (Default position if question not answered):	Yes / No
INVESTMENT INFORMATION – (If Segregated Assets only)	
List the asset classes (eg fixed interest, Australian equities, property, etc.) & their market value at the date the pension is to be commenced:	
Asset	Market Value
TOTAL	

Name of person requesting pension establishment: _____

Ph: _____ Fax: _____ Email: _____

Is this person the SMSF’s financial adviser: Yes / No

Note:

The Establishment Fee will be deducted from the SMSF’s main account, the fee will be as listed in our current fee schedule.

If Super Plus does not currently administer the SMSF we will require payment in advance as per our current fee schedule and will contact you regarding this order as additional information will be required.

Return Completed form to:

Super Plus Australia Pty Ltd, GPO Box 734 BRISBANE QLD 4001