

Self Managed Superannuation Fund

Pension commencement - account based pension

Complete this form to request for the documentation for a member to commence an account based pension, including transition to retirement income stream.

Before proceeding, check to ensure that:

- the self managed superannuation fund trust deed permits the trustee to pay an account based pension and transition to retirement income stream (if applicable).

PART 1 PRIMARY CONTACT DETAILS

Title Mr Ms Mrs Miss

Given name

Surname

Address

Postal address (if different)

I am a trustee/director adviser

Telephone

Telephone (after hours)

Mobile

Email (required)

PART 2 FUND DETAILS

Fund name

Fund ABN

Fund TFN

Address for trustee meeting to be held

If corporate trustee

Company name

Company registered address

Company ACN/ ABN

PART 3 SMSF TRUSTEE AND MEMBER DETAILS**PERSON A**Title Mr Ms Mrs MissGiven name Surname Role Individual trustee
 Trustee director
 Member**PERSON B**Title Mr Ms Mrs MissGiven name Surname Role Individual trustee
 Trustee director
 Member**PERSON C**Title Mr Ms Mrs MissGiven name Surname Role Individual trustee
 Trustee director
 Member**PERSON D**Title Mr Ms Mrs MissGiven name Surname Role Individual trustee
 Trustee director
 Member**PART 4 MEMBER COMMENCING PENSION & DETAILS OF PENSION**Member commencing pension Date the pension is to commence The total amount the member wish to use to commence the pension (pension purchase price)

For example: <\$amount> or account balance as at <date>.

Date of birth Tax file number Member address **Type of pension** (select one): Transition to retirement income stream (account based)
Suitable if you:
 have reached your preservation age, and
 still working full-time or part-time. Account based pension
Suitable if you satisfy any of the following:
 have reached your preservation age and retired, or
 are 65 years of age and over.**Is the member nominating a reversionary beneficiary** (select one): No Yes, complete below

A reversionary beneficiary must be a dependant for superannuation and tax purposes, e.g. spouse (legal or de facto). Your nomination cannot be changed once your pension commences. If you nominate your child, you can only nominate a child who is less than 18 years of age, or a child who is over the age of 18 years and under 25 years who is financially dependent on you at the date of nomination, or a child who is permanently disabled. A pension that is paid to a reversionary beneficiary who is a child will automatically terminate if the child has ceased to be entitled to receive a pension or on the child's 25th birthday, and the remaining balance of the pension account (if any) will be paid as a lump sum unless the child is permanently disabled.

Reversionary beneficiary details:

Given name Surname Date of birth Relationship to member

TERMS AND CONDITIONS

1. Definition

In these terms and conditions:

Fee schedule means our current schedule of fees describing the fees that we will charge for our services.

We, Us, Our means Superannuation Accounting Services Pty Ltd.

You, Your means the client named on the form and includes any person using our services on your behalf with your authority.

2. Our service

We will provide you with the services you have selected. We will charge you, and you agree to pay us, the fees for providing you with services in accordance with our Fee Schedule.

(a) Pension commencement documentation

You confirm that you have obtained financial, tax and/or legal advice or you do not require advice in respect to commencing a pension in your self managed superannuation fund.

You acknowledge and agree that our service is a documentation service and we do not review your needs or the structure of the fund and therefore do not warrant that the document is suitable or appropriate for your needs. You agree to indemnify us against any liability, loss, damage or cost that you, any trustee and member or any other person suffers because the document is not suitable or appropriate for your needs.

Excluding any warranties and conditions that cannot be excluded or limited, you agree that our liability in respect to providing you with pension commencement documentation is limited to, at our option: re-providing the services, payment of the cost of a service provider to re-provide the services, or refunding the amount of fee paid.

3. Fees

(a) How much will we charge you?

We will charge you the fees described in our Fee Schedule for providing you with services. Our Fee Schedule is available from our website www.superaccounting.com.au.

(b) When will we charge you?

We require payment to accompany the form unless otherwise agreed.

4. Privacy

We are committed to maintaining the confidentiality of your personal information. Information acquired by us in the course of providing you with service is subject to confidentiality requirements. That information will not be disclosed by us to other parties except with your express consent or required by law.

In providing you with service, it may be necessary for us to disclose your personal information to external service providers or organisations and you consent to us disclosing your personal information to the following external service providers and organisations: auditors, actuaries, document service provider, Government bodies or authorities, including Australian Taxation Office, and our professional advisers, including consultants or lawyers.

Version 2.0 (August2010)