

## Pension Establishment Request

The trustees of the Superannuation Fund detailed below hereby request SuperGuardian to prepare the necessary documentation for the commencement of a pension for the Member detailed below.

By signing this form, the trustees acknowledge and accept SuperGuardian's pension commencement fee, as outlined in the fee schedule.

### Pension Establishment Details

Superannuation Fund Name \_\_\_\_\_

Member Name (pension recipient) \_\_\_\_\_

Pension Commencement Date \_\_\_\_\_

Is the Member Claiming the tax-free threshold?      YES                      NO                      N/A 60+

Use full member balance to commence pension?      YES                      NO

If NO, amount used to commence pension: \$ \_\_\_\_\_

Is the member intending to claim any member concessional (deductible) contributions within the financial year prior to commencing a pension?      YES                      NO

Is the member currently in receipt of any other pension/s from another superannuation fund?

YES                      NO

If YES, can the member confirm that the new pension will not cause the member to exceed their Personal Transfer Balance Cap?      YES                      NO

Is the member currently in receipt of the Australian Age Pension or Commonwealth Seniors Health Card?

YES                      NO

If YES, has the member sought advice on the implications of the new pension (we strongly recommend you seek advice)?      YES                      NO

### Condition of Release

Attained Age 65

Termination of Employment (Aged 60-64)

Permanent Retirement (Aged 55-64)

Pre-Retirement Pension (Aged 55-64)

Aged 60 and ceased gainful employment

Other \_\_\_\_\_

**Is the pension to be reversionary?**

YES

NO

Name of Reversionary Beneficiary: \_\_\_\_\_

Relationship with the Member: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**Member Authority**

Signed by the requesting member.

**Member:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Trustee Authority**

Trustee 1: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Trustee 3: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Trustee 5: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Trustee 2: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Trustee 4: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Trustee 6: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

or

**Adviser Authority**

**Adviser:** \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_