

**Self managed superfund
Pension commencement (account based pension)**

Complete this form if you want Superannuation Accounting Services to prepare the documentation for a member to commence a pension a self managed superfund

Who is completing this form?

Trustee Financial adviser Other:

Check to ensure that:

- the self managed super fund trust deed allows trustees to pay account based pensions or transition to retirement account based pension, otherwise the trust deed may need to be updated,
- the trustee(s) and/or member have obtain financial, legal, taxation and other advice where necessary.

Part 1 Self managed superfund details

Fund name	<input type="text"/>		
Fund ABN	<input type="text"/>	Telephone	<input type="text"/>
Address where trustee meeting will be held	<input type="text"/>	Telephone (after hours)	<input type="text"/>
	<input type="text"/>	Mobile	<input type="text"/>
Document delivery address	<input type="text"/>	Email	<input type="text"/>
	<input type="text"/>		<input type="text"/>

The fund is an existing client? (please tick one) Yes No

Part 2 Member commencing pension details

Details of member commencing pension

Name	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Tax file number	<input type="text"/>
	<input type="text"/>		

The person commencing pension is a member of the fund (please tick) Yes

The member is commencing a (please tick one):

- | | |
|--|--|
| <input type="checkbox"/> transition to retirement account based pension | <input type="checkbox"/> an account based pension |
| Suitable if you: | Suitable if you satisfy any of these: |
| <ul style="list-style-type: none"> • have reached your preservation age, and • still working full-time or part-time. | <ul style="list-style-type: none"> • have reached your preservation age and retired, or • are 65 years of age or over. |

Part 3 Amount use to set up and commence date of pension

The total amount the member want to use to set up the pension (pension purchase price)

\$

For example:
 • <\$amount>, or
 • full account balance as at <date>

Date the pension is to commence

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Part 4 Revisionary beneficiary (optional)

Is the member nominating a revisionary beneficiary (please tick one) Yes, completed below No

A revisionary beneficiary must be a dependant, e.g. spouse (legal or de facto), dependant child, and any other person with whom the member have an interdependency relationship.

Beneficiary name	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Relationship to you	<input type="text"/>
	<input type="text"/>		

Part 5 Trustee(s) of self managed superfund details

! Complete either 5A (individuals as trustees) or 5B (Corporation as trustee) only.

5A - Individuals as trustees

Provide details of all trustee:

Name of trustee 1	<input type="text"/>	Name of trustee 2	<input type="text"/>
Name of trustee 3	<input type="text"/>	Name of trustee 4	<input type="text"/>

5B - Corporate trustee

Provide details of the corporate trustee and director(s):

Trustee company details:

Name of company	<input type="text"/>	ABN	<input type="text"/>
Registered address	<input type="text"/>		
	<input type="text"/>		

Name of director(s)

Name of director 1	<input type="text"/>	Name of director 2	<input type="text"/>
Name of director 3	<input type="text"/>	Name of director 4	<input type="text"/>

Payment options

Direct deposit

Deposit into:

BSB: 032 718 Account: 294534
(use Trustee 1's last name as reference)

Cheque payment

Please enclose a cheque make payable to 'Superannuation Accounting Services'

Credit card

Visa Mastercard Bankcard

Card number:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Please charge Expiry

Signature

1300 735 254
superaccounting.com.au

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Returning the form

Fax completed form to:
(02) 9221 0564

Post completed form to:
Superannuation Accounting Services
GPO Box 4534
Sydney NSW 2001

Hand deliver form to:
Level 5
34 Hunter Street
Sydney NSW 2000

If you need help

] If you need help on completing the form or for more information, call us on 1300 735 254.

Terms and conditions

1. You confirm that you have made your own decision to commence a pension having regards to your personal financial circumstances and have obtain financial, tax and other advice where necessary.
2. **WE DO NOT PROVIDE LEGAL ADVICE.** We are not a law firm and cannot give legal advice and we do not give legal advice.
3. You acknowledge and agree that:
 - (a) our services is a documentation service only and not advice; and
 - (b) we do not review your needs and therefore do not warrant that the document is suitable or appropriate for your needs or the use of the document is suitable or appropriate for your needs.
4. You agree that you indemnify us and continually indemnify us against any liability, loss, damage or cost that you, any trustee(s)/member(s) or any other person suffers because the document is not suitable or appropriate for your needs.
5. You agree to pay us for the services provided to you within the specified period for setting up the self managed superfund in accordance with the information supplied on this form.
6. You understand that our fee is not refundable.
7. Excluding any warranties and conditions that cannot be excluded or limited, you agree that our liability is limited to, at our option:
 - (a) re-providing the services;
 - (b) payment of the cost of a service provider to re-provide the services; or
 - (c) refunding the amount of fee paid.