

Account Based Pension Reset

Please attach a copy of the Funds Current Trust Deed to your order, then
Fax or Email this completed form to Super Registry:
Fax: (03) 8256 0108 / Email: info@superregistry.com.au

Contact Details:

Advisor Name:

.....

Advisor Company:

.....

Postal Address:

.....

Phone:

.....

Email:

.....

Payment Details:

Enclosed is payment for an Account Based Pension Reset for \$330.00

Direct Deposit* Cheque

Account name: Super Registry Pty Ltd
Account details: Macquarie Bank
BSB: 183-334
Account: 122 641 285

**If you are paying via direct deposit please use the Fund name as the transaction reference*

Fund Details:

Name of Fund:

.....

Address of the meetings of the
Trustees/Members

.....

Trustee Details (if a Corporate Trustee):

Company Name:

.....

Company ACN:

.....

Registered address:

.....

Company Chairman:

.....

Trustee Details (if individual Trustees):

Trustee Names:

..... Individual trustee or Director
..... Individual trustee or Director
..... Individual trustee or Director
..... Individual trustee or Director

Member receiving Pension:

Member Name:

.....

Address:

.....

Date of Birth:

/ /

Gender:

.....

.....

Eligible Service Date:

/ /

Tax File Number:

.....

.....

Pension Details:

Pension Reset Date:

/ /

.....

Pension Purchase Price:

\$

.....

Is the **current pension** a Transition to Retirement Pension?

YES

NO

Is the **new pension** a Transition to Retirement Pension?

YES

NO

At what Frequency will the Pension Payments be made? WEEKLY MONTHLY QUARTERLY YEARLY

Does the existing pension have a reversionary? YES NO

Pension Reversionary

Reversionary Name:

.....

Address:

.....

Date of Birth:

/ /

Relationship to Pensioner:

.....

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New Pension Components

Enter the details of the new pension balance tax free and taxable components

Tax Free component	\$	%
Taxable component	\$	%
TOTAL PENSION PURCHASE PRICE	\$	%