

Conversion of an Allocated Pension to a Account Based Pension Order Form

What you are required to do to order your Document:

1. Complete all relevant fields in BLOCK LETTERS
2. Attach a copy of the Fund's most recent Trust Deed.
3. Mail this form, along with the documentation outlined above, to Superannuation Support. Alternatively, email this form and the required documentation to Superannuation Support at admin@supersupport.com.au

SECTION A(I): PERSON/ADVISOR ORDERING INCOME STREAM

YOUR NAME				Signature	
YOUR POSTAL ADDRESS					
YOUR COMPANY NAME					
DATE OF ORDER				Your Ref.	
Phone		Fax		Email	

SECTION A (II): PAYMENT DETAILS

Enclosed is Payment for an ACCOUNT BASED PENSION for the sum of \$

Direct Debit
 Visa Card
 MasterCard
 Cheque

Card Holder Name			
Credit Card Number	- - -		
Expiry Date	/	Authorised Card Signature	

*To pay by Direct Debit you must have a current Direct Debit arrangement with Superannuation Support Pty Ltd.

If you would like to arrange for Direct Debit for future purchases please contact Superannuation Support Pty Ltd on 1300 762 663.

SECTION B: FUND DETAILS

FUND NAME			
Address where the meetings of the Trustees are held			

If the Trustee of the Fund is a Company, enter the Company Details below.

Corporate Trustee Name		ACN	- -
Registered Address			
Company Chairman			

Enter the details of the Individual Trustees, or if the Trustee is a Company, the Directors of the Corporate Trustee.

Trustee 1 Name		Individual Trustee	<input type="checkbox"/>	Director of Corporate Trustee	<input type="checkbox"/>
Trustee 2 Name		Individual Trustee	<input type="checkbox"/>	Director of Corporate Trustee	<input type="checkbox"/>
Trustee 3 Name		Individual Trustee	<input type="checkbox"/>	Director of Corporate Trustee	<input type="checkbox"/>
Trustee 4 Name		Individual Trustee	<input type="checkbox"/>	Director of Corporate Trustee	<input type="checkbox"/>

SECTION C: DETAILS OF MEMBER RECEIVING BENEFIT

MEMBER NAME				Title	
Date of Birth		Gender (M/F)			
Eligible Service Date		Tax File Number	-	-	
Address					

*Only applicable if the Member’s name has change since the Fund last dealt with the Tax Office

SECTION D: PENSION DETAILS

Existing Allocated Pension Details:

Existing Allocated Pension commencement date				
Is the existing Allocated Pension a Transition to Retirement Pension?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Allocated Pension Deductible Amount	\$			
Allocated Pension conversion date				

New Account Based Pension details:

Is the Account Based Pension a Transition to Account Based Pension?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>				
At what Frequency will Pension Payments be Made?	Weekly	<input type="checkbox"/>	Monthly	<input type="checkbox"/>	Quarterly	<input type="checkbox"/>	Yearly	<input type="checkbox"/>

DOES THE EXISTING ALLOCATED PENSION HAVE A REVERIONARY PENSIONER NOMINATED? Yes No

Reversionary Details:

Full Name of Reversionary			Gender (M/F)	
Address				
Date of birth		Relationship to Pensioner		

SECTION E: PENSION PURCHASE PRICE COMPONENTS – IF ALREADY CRYSTALLISED

Enter the Details of the Member’s Allocated Pension balance as at the date of conversion.

Tax free Component – Contributions segment	\$	%
Tax free Component – Crystallised segment	\$	%
Taxable Component	\$	%
TOTAL PENSION PURCHASE PRICE	\$	%

SECTION F: PENSION PURCHASE PRICE COMPONENTS – IF NOT ALREADY CRYSTALLISED

Enter the Details of the Member’s Allocated Pension balance as at the date of conversion.

Pre/Post Component	\$
Undeducted Contributions	\$
Concessional Component	\$
Post June 1994 Invalidation Component	\$
CGT Exempt Component	\$
TOTAL PENSION PURCHASE PRICE	\$

ADDITIONAL INFORMATION:
