

## Account Based Pension & Transition to Retirement 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](mailto:admin@supersupport.com.au)

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

<b>YOUR NAME</b>				<b>Signature</b>	
<b>YOUR POSTAL ADDRESS</b>					
<b>YOUR COMPANY NAME</b>					
<b>DATE OF ORDER</b>				<b>Your Ref.</b>	
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	/		<b>Authorised Card Signature</b>		

\*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

<b>FUND NAME</b>					
Registered Address					
Address where the meetings of the Trustees are held					
ABN of the Fund	-	-	-		

IS THE FUND CURRENTLY REGISTERED FOR PAYG WITHHOLDING?      YES     NO

IS THE FUND REQUIRED TO BE REGISTERED FOR PAYG WITHHOLDING?    YES     NO

## SECTION C: TRUSTEE INFORMATION

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"/>

Which Trustee / Director will sign the Tax Office Documentation relating to the pension if applicable?	
Trustee / Director's Title	
Trustee / Directors Contact Phone Number	

## SECTION D: DETAILS OF MEMBER RECEIVING BENEFIT

<b>MEMBER NAME</b>		Title	
Previous Member Name*			
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 E: PENSION DETAILS

<b>PENSION PURCHASE PRICE</b>	\$							
Is this a Transition to Retirement Pension?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>				
Is this the Members Full Balance in the Fund?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>				
If no, what is the Members Full balance in the Fund?	\$							
Tax Free Threshold Claimed?*	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"/>

\*Note: If the Recipient of the Pension has already claimed the tax free threshold through their employment or another income stream, do not claim the tax free threshold for this Pension.

ARE YOU NOMINATING A REVERSIONARY FOR THIS PENSION?

Yes  No

**REVERSIONARY DETAILS**

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

**SECTION F: PENSION PURCHASE PRICE COMPONENTS – IF ALREADY CRYSTALLISED**

Enter the Details of the Members Balance to be transferred into the Pension:  
For Pensions commencing from a direct Rollover of Funds, enter the components as shown on the Rollover Statement.

Tax free Component – Contributions segment	\$	%
Tax free Component – Crystallised segment	\$	%
Taxable Component	\$	%
<b>TOTAL PENSION PURCHASE PRICE</b>	<b>\$</b>	<b>%</b>

**SECTION G: PENSION PURCHASE PRICE COMPONENTS – IF NOT ALREADY CRYSTALLISED**

Enter the Details of the Members Balance to be transferred into the Pension:  
For Pensions commencing from a direct Rollover of Funds, enter the components as shown on the Rollover Statement.

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

**SECTION H: TAX OFFICE INFORMATION (IF PENSIONER AGED BETWEEN 55-59)**

Please answer the following questions relating to the Pension commencement:

- Is the Pensioner an Australian Resident for Tax Purposes? Yes  No
- Is the Pensioner claiming a reduced rate of withholding for either family tax benefit?  
or Senior Australians tax offset? Yes  No
- Is the Pensioner claiming a zone, dependant spouse or special tax offset? Yes  No
- Does the Pensioner have an accumulated HECS Debt? Yes  No
- Does the Pensioner have an accumulated Financial Supplement Debt? Yes  No

**ADDITIONAL INFORMATION:**

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