

## TERM ALLOCATED PENSION ORDER FORM.

- Please complete all details in block letters -

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

<b>PERSON ORDERING PENSION</b>				<b>Signature</b>	
<b>Date document ordered</b>		/ /		<b>Your Ref.</b>	
Firm name (if applicable)					
Street address					
Postal address, if different					
Phone		Fax		Email	

### SECTION A(II): PAYMENT DETAILS

Enclosed is Payment for a TERM ALLOCATED PENSION for the sum of \$

Direct Deposit     
  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 a 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 (I): FUND DETAILS

<b>FUND NAME</b>			
Registered Address			
Tax File Number	- -	ABN	- - -

DO YOU WANT SUPERANNUATION SUPPORT PTY LTD TO REGISTER THE FUND FOR PAYG WITHHOLDING?\*

\*Additional charges apply

YES       NO

### SECTION B (II) TRUSTEE INFORMATION

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"/>

Corporate Trustee Name (If applicable)		ACN	- -
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### SECTION C: PENSIONER RBL DETAILS

Current Lump Sum RBL	\$
Pension RBL	\$
Excess Benefit Amount of Pension	\$

## SECTION D: DETAILS OF MEMBER RECEIVING BENEFIT

<b>MEMBER NAME</b>			
Date of birth	/ /	Tax File Number	- -
Eligible Service Date			
Address			

## SECTION E: PENSION DETAILS

<b>PENSION COMMENCEMENT DATE</b>	/ /	<b>PENSION PURCHASE PRICE</b>	\$
Is this a Transition into Retirement Pension?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Is this a 50% Assets Test Exempt Centrelink Pension?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Will the Pensioner be Claiming the Tax Free Threshold for this Pension?	Yes	<input type="checkbox"/>	No <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.

### PENSION TERM

Pension Term	
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Please select the appropriate basis of the Pension term:

<input type="checkbox"/>	Non Reversionary Pension – Pension Term equals the life expectancy of the Pension recipient
<input type="checkbox"/>	Non Reversionary Pension – Pension Term of years up to age 100
<input type="checkbox"/>	Reversionary Pension – Pension Term equals the life expectancy of the Pension reversionary
<input type="checkbox"/>	Reversionary Pension – Term of years up to age 100

### REVERSIONARY DETAILS (IF APPLICABLE)

Full Name of Spouse		
Address		
Date of birth	/ /	

### CONDITION OF RELEASE

One of the following conditions of release must be met for a payment to be made:

<input type="checkbox"/>	I am 55 years of age or more and declare that I have ceased employment and do not intent to ever take up employment for more than ten hours per week.
<input type="checkbox"/>	I am 60 years of age or more and left my employer after my 60 <sup>th</sup> birthday.
<input type="checkbox"/>	I am 65 years of age or over.
<input type="checkbox"/>	I am 55 years of age or over and wish to commence a non-commutable income stream.
<input type="checkbox"/>	I wish to commence a pension with my unrestricted benefit in the Fund only.

## SECTION F: PENSION PURCHASE PRICE COMPONENTS

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.

Post 30/6/94 Invalidation Component	\$
CGT Exempt Component	\$
Concessional Component	\$
Undeducted Contributions	\$
Pre and Post	\$
<b>TOTAL PENSION PURCHASE PRICE</b>	<b>\$</b>