



prosuper

**Minimum Only and
Transition to Retirement
Pension Order Form**

pro-super australia Pty Ltd
ACN 097 625 235
level 19, 10 eagle street,
brisbane qld 4001
gpo box 26
brisbane qld 4001

freecall: 1800 641 146
freefax: 1800 024 831
prosuper@prosuper.com.au

Client Details

Firm Name:

Contact Name:

Address:

Phone:

Email:

Fund Details

Fund Name

Trustee Details

Fund Trustee (s)

Street Address

A.C.N

(If trustee is a company)

Directors

Member Details

Full Name

D.O.B.

Street Address

Pension Details

Percentage of member's account balance to be used to fund pension:-

EITHER :- % of account balance

OR :- \$ from account balance

Eligible Service Period Start Date:

Pension Commencement Date:

Is this Pension a Transition to Retirement Pension?

Yes

No

- A Member from age 55 can commence a pension before they retire, however, until they retire or reach 65 years of age (whichever comes first), the payments in a year (including payments made under a Splitting Order) must not be larger in total than their Account Balance x 10%

Current Account Balance details:

Tax-Free Component: \$

Taxable Component: \$

TOTAL: \$

Is there a Reversionary Beneficiary?

Yes

No

- the pension may continue to be paid to a spouse, or a child of the beneficiary if the child:

- is less than 18 years of age; or
- is greater than 18 years of age, but less than 25 years of age and is financially dependent on the Member; or
- has a disability of the kind described in subsection 8(1) of the *Disability Services Act 1986*

Full Name

D.O.B.

Payment details if paying by credit card

Please debit the following credit card by the amount of \$

CARD TYPE: Visa MasterCard

CARD NUMBER:

EXPIRY DATE :

NAME ON CARD :

SIGNATURE :

Member Details

Full Name

D.O.B.

Street Address

Pension Details

Percentage of member's account balance to be used to fund pension:-

EITHER :- % of account balance

OR :- \$ from account balance

Eligible Service Period Start Date:

Pension Commencement Date:

Is this Pension a Transition to Retirement Pension?**Yes****No**

- A Member from age 55 can commence a pension before they retire, however, until they retire or reach 65 years of age (whichever comes first), the payments in a year (including payments made under a Splitting Order) must not be larger in total than their Account Balance x 10%

Current Account Balance details:

Tax-Free Component: \$

Taxable Component: \$

TOTAL: \$**Is there a Reversionary Beneficiary?****Yes****No**

- the pension may continue to be paid to a spouse, or a child of the beneficiary if the child:
- is less than 18 years of age; or
 - is greater than 18 years of age, but less than 25 years of age and is financially dependent on the Member; or
 - has a disability of the kind described in subsection 8(1) of the *Disability Services Act 1986*

Full Name

D.O.B.

Payment Details if paying by credit card:

Please debit the following credit card by the amount of \$

CARD TYPE: Visa MasterCard

EXPIRY DATE :

CARD NUMBER:

SIGNATURE :

NAME ON CARD :