



**prosuper**

**Pension Order Form  
Account Based and  
Transition to Retirement  
Pension**

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**prosuper@prosuper.com.au**

**Client Details**

Firm Name:

Contact Name:

Address:

Phone:

Email:

**Fund Details**

Fund Name

**Trustee Details**

Corporate Trustee:

*(if applicable)*

A.C.N

Names of Directors/  
Individual Trustees

Street Address:

*(If trustee is a company use  
Registered Office address)*

## Member 1 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 2 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 :