



prosuper

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

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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 Income Stream?

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 :

CCV:

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

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