

Commutation of Pension

Outlined below is a checklist of the information needed to complete a Pension Commutation order.

Fund Details

- Name of the Superannuation Fund
- Meeting address of the trustees of the Fund

Member Details

- Member's full name/address
- Member's Date of Birth

Trustee Details

If the Fund has individual trustees:

- Full name of each individual trustee
- Address of each individual trustee

If the Fund has a corporate trustee:

- Name of the company
- ACN of the company
- Registered address of the Company
- Full name/address of director/s of the trustee company

Pension Details

- Commutation Date
- Commutation Amount:
 - Enter Dollar Amount; or
 - 'Amount in Excess of the General Transfer Balance Cap of \$1.6 million as at 30 June 2017'
- Pension Type – Account based pension, Market linked pension, Complying life time pension or Other.
- Tax Free Percentage
- In specie lump sum

Should you have any queries regarding this checklist, please refer to our Help Centre articles or contact the Support Team.