

Pension (Account Based, Market Linked or TRIS)

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

Fund Details

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

Trustee Details

If the Fund has individual trustee/s:

- 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

Member (Pension Recipient) Details

- Member's full name and address
- Member's date of birth

Pension Type

- Select Pension Type: Account Based, Market Linked, TRIS

Pension Details

- Commencement Date
- Condition of Release: Retirement, Reaching age 65, Rollover, Total and Permanent Disability, Death
- Pension Account Balance
- Current Year Payment
- Tax Free Percentage
- Reversionary Beneficiary Name (if applicable)
- Reversionary Terms and Conditions (if applicable)

Asset Segregation (If applicable)

- Asset Name
- Percentage

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