



Pension Establishment Request

The trustees of the Superannuation Fund detailed below hereby request Xpress Super to prepare the necessary documentation for the commencement of a pension for the Member detailed below.

By signing this form, the trustees acknowledge and accept Xpress Super's pension commencement fee, as outlined in the fee schedule.

Pension Establishment Details

Superannuation Fund Name _____

Member Name (pension recipient) _____

Pension Commencement Date _____

Is the Member Claiming the tax-free threshold? YES NO N/A 60+

Use full member balance to commence pension? YES NO

If NO, amount used to commence pension: \$ _____

Is the member intending to claim any member concessional (deductible) contributions within the financial year prior to commencing a pension? YES NO

Is the member currently in receipt of any other pension/s from another superannuation fund?

YES NO

If YES, can the member confirm that the new pension will not cause the member to exceed their Personal Transfer Balance Cap? YES NO

Is the member currently in receipt of the Australian Age Pension or Commonwealth Seniors Health Card?

YES NO

If YES, has the member sought advice on the implications of the new pension (we strongly recommend you seek advice)? YES NO

Condition of Release

Attained Age 65

Termination of Employment (Aged 60-64)

Permanent Retirement (Between preservation age - 64)

Pre-Retirement Pension (Between preservation age - 64)

Other _____

Is the pension to be reversionary?

YES

NO

Name of Reversionary Beneficiary: _____

Relationship with the Member: _____

Date of Birth: _____

Member Authority

Signed by the requesting member.

Member: _____

Signed: _____ Date: _____

Trustee Authority

Trustee 1: _____

Signed: _____ Date: _____

Trustee 3: _____

Signed: _____ Date: _____

Trustee 5: _____

Signed: _____ Date: _____

Trustee 2: _____

Signed: _____ Date: _____

Trustee 4: _____

Signed: _____ Date: _____

Trustee 6: _____

Signed: _____ Date: _____

or

Adviser Authority

Adviser: _____

Signed: _____ Date: _____

