

# Request to Commence Pension & Income Stream



## 1. Fund Details

Fund Name

## 2. Member Details

Family Name

Given Names

Date of birth

Condition of release (please specify)

Attained Preservation Age (Non –commutable Pension)

Over 55, Retired with no intention to re-enter the work force

Over 60 and Retired

65 or over

Other –specify:

## 3. Pension Details

Please complete a separate application form for each pension

Account-Based Pension

Transition to Retirement Pension

Market Linked Pension

Allocated pension (Not available after 20 September 2007)

Commencement Date

Amount used to purchase pension

Entire available balance

Other amount-specify:

Tax Free Threshold to be claimed for this pension

Yes

No

Not applicable-60 or over

Is Pension Reversionary ?

Yes (complete section 4)

No (skip to section 5)

# Request to Commence Pension & Income Stream (continued)



## 4. Reversionary Details

Family Name	<input type="text"/>	Given Names	<input type="text"/>
Date of birth	<input type="text" value="/ /"/>	Relationship to Member	<input type="text"/>

## 5. Member Declaration

I hereby request that a Pension be commenced by my fund as indicated.

- I acknowledge that the trustee cannot provide me with advice about my benefits, investments and taxation implications that take into account my personal circumstances
- I acknowledge that the trustee does not guarantee my investment in the fund
- I declare that I have reached my prescribed preservation age and the information provided on this form is complete and correct

Signed	<input type="text"/>	Date	<input type="text" value="/ /"/>
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