

Instruction to commence pension

Please note that once a pension has commenced you will not be able to claim a tax deduction on any of the contributions used to commence the pension, you will also not be able to alter a tax deduction previously claimed on any of the contributions used to commence the pension.

Please complete this form in black ink, using block letters.

1. Fund and member details



2. Account based pension details

Is this a transfer of an existing fund?

no

yes

I hereby elect to receive a pension, subject to the conditions imposed by the law and the Australian Taxation Office.

purchase price	\$	If you complete this box, please provide details in pension funding source section below	or entire balance
commencement date	/ /	preferred first payment date	
		(must be at least one week after comr	nencement date)
amount of pension re	equired minimum or max	ximum (only applicable to TTR pensions)	
	or amount \$	per payment	
I would like my accum	ulation account to remain oper	n yes no	

2. Account based pension details (continued)

payment frequency			
	weekly	day of week	
	fortnightly	day of week	
	monthly	Start date	
	quarterly	Start date	DD / MM / YYYY
	Half yearly	Start date	DD / MM / YYYY
	Yearly	Start date	DD / MM / YYYY
Bank details for payme	ent		
account name			
financial institution			
branch name			
BSB		-	account number
Non-reversionary			
Reversionary	-		ce at my death to be used to continue a pension to my surviving spouse. t nominations are not available if you select this option).
spouse's full name			
date of birth	/	1	spouse's tax file number
signature of spouse			date / /

3. Proof of identity and age requirements

I have attached a copy of an appropriate form/s of identification, as detailed below.

Either

- driver's licence issued under State or Territory law or
- passport

or

- birth certificate or birth extract or
- citizenship certificate issued by the Commonwealth or
- pension card issued by Centrelink

And

- letter from Centrelink regarding a government assistance payment or
- notice issued by Commonwealth, State or Territory Government or local council within last 12 months that contains your name and residential address (eg ATO notice of assessment, rates notice from local council).

4. Source of funds

Use the table below to indicate the assets you will be using from your existing member account to start your pension.

asset name	Acc	ount Based Pension
	number of units	\$ amount (est)
Perpetual's Cash Management Fund	N/A	
		Total (\$)

5. Rollover details

Transfer from other superannuation funds/rollover funds (see compliance letters attached to this form).

fund name									
amount \$									
Is the rollover from a complying pension?	yes	no							
fund name									
amount \$									
Is the rollover from a complying pension?	yes	no							
fund name									
amount \$									
Is the rollover from a complying pension?	yes	no							

6. Trustee certification and instruction

I/we certify that the member whose details appear in Section 1 has satisfied the following condition of release:

he/she has ceased employment between the ages 60 and 65
he/she has reached age 65
he/she has ceased employment having reached his/her preservation age, and it is not his/her intention to work again
he/she is permanently incapacitated
he/she has reached his/her preservation age but is still working ('Transition to retirement' provisions will apply to the pension).

I/We instruct PTCo to commence the pension as detailed in this form, in our superannuation fund:

member/trustee signature	date	/	/	Ш	Ц	
member/trustee signature	date	/	/			
member/trustee signature	date	/	/			
member/trustee signature	date	1	/			
Company signatures						

signature		date /		COMPANY SEAL
full name				
capacity	sole director director			
		_		
signature		date /	/	
full name				
capacity	director company secretary			



This certificate is for use by trustees using the Self Managed Super Fund Service.

Certificate of Compliance

To Whom it may concern

-																
fund name																
ABN	Ε		Ι	Ι	Т	Ε	(if	availa	able)	1						

As Trustees for the above named Self Managed Superannuation Fund ('the Fund'), we confirm that the Fund is registered as a Complying Superannuation Fund and complies with:

- the provisions of the Superannuation Industry (Supervision) Act 1993 and Regulations ('SIS');
- provides for benefits to be transferred into the Fund; and
- the preservation requirements as set out in SIS.

We also confirm that the Trust Deed ('the Deed') establishing the Fund allows for acceptance of all contribution types including superannuation guarantee contributions from any employer on behalf of a member.

Further confirmation as to the Fund's compliance can be obtained from the Australian Taxation Office's Register of Complying Funds (ROCS), which can be accessed online via **www.ato.gov.au** or by calling 13 10 20. Please quote the Fund's Australian Business Number (ABN) (provided above) when initiating the search.

Yours faithfully

trustee signature												
full name												
trustee signature												
full name												
trustee signature												
full name												
trustee signature												
full name												
date	/	/										

Company signatures

signature		date / / / COMPANY SEAL
full name		
capacity	sole director director	
signature		date / /
full name		
capacity	director company secretary	