



# ACCOUNT BASED PENSION ESTABLISHMENT APPLICATION

Person Ordering:

Address:

Contact Phone No:  Email or Fax:

Fees: Commencement - \$650 each; Rollover/Restart of pension commenced by us - \$350 each

Fund Name:

Address for Meetings:

Pension Member:

Date of Birth:  Male:  Female:

Pension Commencement Date:

Is this a rollover/restart of an existing pension? Yes:  No:

If so: did we prepare original pension documents? Yes:  No:

Is this a Transition to Retirement Pension? Yes:  No:

Starting Account Balance: \$

Pension required per annum \$

Reversionary Pension ? Yes:  No:

If so, name of Reversionary Pensioner:

DOB of Reversionary Pensioner:

Is Reversionary Pensioner a spouse or child < 18 years? Spouse:  Child < 18:

Member Components (If administered by us the following will be sourced from the information held on file)

Taxable Component: \$	<input type="text"/>	Preserved:	\$	<input type="text"/>
TaxFree Component: \$	<input type="text"/>	Restricted Non Preserved:	\$	<input type="text"/>
Total:	\$	Unrestricted Non Preserved:	\$	<input type="text"/>

Where we do not attend to the administration of the Fund please also provide an extract of the relevant clauses of the Fund's Trust Deed confirming that it can commence a pension for the member.

Authorised by:

Payment Method? Cheque:  MasterCard:  Visa:  Deduction Authority held:

Card Holder Name:

Credit Card No:  Expiry Date:

Signature:

***Payment method must be completed prior to sending with applicable attachments to:***

ON COMPLETION PLEASE FAX OR SCAN & EMAIL TO  
TRANZACT SUPER [contact@tranzacttotalsuper.com.au](mailto:contact@tranzacttotalsuper.com.au)  
PHONE: 1800 644 804 FAX: 07 3211 1455

GPO Box 849 / Brisbane Qld 4001  
ABP Req TS 0110