

Name of the SMSF:

Name of Person commencing Pension:

PART A: PENSION TYPE

Please select the type of pension the above-named is to receive:

- ACCOUNT-BASED PENSION (ABP)
- TRANSITION TO RETIREMENT PENSION (TRIS)



PART B: TAX-FREE THRESHOLD

If the pension will be taxable (i.e. the member is less than 60 yrs old) and earns a salary or wage, the tax office suggests claiming the tax-free threshold from the primary (or highest) income source.

Please advise where the tax-free threshold will be claimed:

- INCOME FROM PENSION PAYMENTS
- INCOME FROM EMPLOYMENT

PART C: PENSION COMMENCEMENT DATE

Please nominate the desired pension commencement date:

PART D: INITIAL INVESTMENT

The following amount will be invested from the Super Account on commencement:

- PARTIAL AMOUNT \$
- TOTAL ACCUMULATION BALANCE

PART E: REVERSIONARY NOMINATION

Is the pension reversionary to the spouse? YES NO