

PENSION REQUEST FORM

BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

BELL POTTER

PLEASE COMPLETE IF YOU WOULD LIKE TO:

Commence a transition to retirement pension or superannuation pension

Requirements:

Members to complete and sign:

- **Pension Request Form**
- **TFN Declaration Form (issued by the Australian Taxation Office)**

Please contact Bell Potter Super Solutions on **1300 730 138** with any queries regarding:

- Forms
- Taxation issues regarding the pension
- Minimum/Maximum pension calculations
- Commencement of pension payments

PENSION REQUEST FORM

BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

BELL POTTER

Fund Name

Account Number

I declare that I am

Retired from gainful employment

Continuing to be gainfully employed

I request that you commence

Superannuation pension

Transition to retirement pension

ON THE FOLLOWING TERMS:

Member details

Full Name

Address

Date of Birth

/ /

Pension details

A 'Transition to Retirement Pension' or a 'superannuation pension' is subject to an annual minimum payment based on your age. The maximum 'Transition to Retirement Pension' or 'superannuation pension' allowed to be received annually is 10% and 100% respectively. For pensions established part way through a financial year, a pro rata annual pension amount applies.

The annual minimum pensions aged based:

| Age | Minimum annual percentage factor |
|-----------------|----------------------------------|
| Under age 65 | 4% |
| 65 – 74 years | 5% |
| 75 – 79 years | 6% |
| 80 – 84 years | 7% |
| 85 – 89 years | 9% |
| 90 – 94 years | 11% |
| Aged 95 or more | 14% |

Pension value

Equal to member balance

OR

\$

Net pension payment \$

p.a. OR

Minimum prescribed payment

Payment frequency

Monthly

Quarterly

Half Yearly

Yearly

Pension to commence

/

/

Payments to commence

15 /

/

Nomination of reversionary pensioner

Please advise the name of any dependant who you wish to nominate to become a reversionary pensioner in the event of your death.

Full Name

Address

Relationship

Date of Birth (dd/mm/yyyy)

/ /

Payment details – Bank/Building Society/Credit Union account

Account Name

Account Number

Financial Institution

BSB Number

Member's signature

Signature

Date of Birth (dd/mm/yyyy)

/ /