



# Pension Establishment

<b>Pension Establishment Form Checklist</b>	<b>Required</b>	<b>Completed</b>
Section A – Fund Details	All Cases	
Section B – Pension Member Details	All Cases	
Section C – Pension Details	All Cases	
Section D – Detail of Preparer of this form	All Cases	
Payment of Fee (\$330)	All Cases	
Forward the completed form (plus copy of the trust deed and relevant existing pension documents) to: <b>Discover Supers</b> <b>PO Box 6339</b> <b>MITCHELTON QLD 4053</b>  <b>Phone: 07 3354 4020 (1300 766 487)</b>		

## Section A: Fund Details

<b>SMSF Details (Name only if administered by Discover Supers)</b>	
Name of Fund:	
Fund Tax File Number:	
Fund ABN:	

Trustee/s of the Fund:  
Individual or  
Company Name &  
Name of Directors

## Section B: Pension Member Details

### Pension Member Details (Name only if administered by Discover Supers)

Name of Member:	
Member's Tax File Number:	___/___/___
Member's Date of Birth:	___/___/___
Member's Occupation	
Member's Condition of Release	

## Section C: Pension Details

### Pension Details

Pension Type: **(Please use separate form if more than one pension commencing)**

Account Based Pension Yes / No  
Transition to Retirement Pension Yes / No

Pension Commencement Date: \_\_\_/\_\_\_/\_\_\_

Is the members whole accumulation account to be used to commence the pension: Yes / No  
- If No, please specify the commencement pension amount: \$\_\_\_\_\_

Will the pension be the Minimum Pension Payment: Yes / No  
- If No, please specify the Annual pension amount: \$\_\_\_\_\_

Pension Funding Components (or detailed members statement at commencement of pension)

Tax-Free Amount	\$ _____	_____ %
Taxable Amount	\$ _____	_____ %
Total Amount	\$ _____	100 %

Frequency of Pension Payments: (Circle one) Monthly / Quarter / Annual/AdHoc

Are segregated assets going to be used to support the pension: No (Default position) / Yes  
- If Yes, please specify the assets (or asset class/es) held to be used.

## Section D: Disclaimer

### Important Information

Discover Supers has not provided any investment or other advice in relation to setting up this Pension. In the set-up process Discover Super may be required to source document's, including but not limited to: trust deeds, trust deed updates and product discloser statements, produced by a qualified legal practitioner. We fully disclaim any liability for reliance on such documents by the trustees (and/or any other individual and/or other entity).

### Acknowledged and Signed by the person completing this form:

\_\_\_\_\_  
Signed    Print Name    \_\_\_/\_\_\_/\_\_\_  
Date

Role of this Person:     Financial Planner / Trustee (Please Circle)

Ph: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

<b>Payment Details</b> <i>(Payable prior to set-up unless approved purchaser)</i>	<b>Price (inc GST)</b>	
Pension Set-up	\$330	
	<b>Total Payable</b>	
<b>Payment Options</b>		
Cheque payable to Discover Super		
Direct Credit		
Bank:                          Bank of Queensland BSB:                                124-001 Account:                        2169 4710 Please email <a href="mailto:admin@mscj.com.au">admin@mscj.com.au</a> when paid		