

Pension to Super commutation form

Please note:

- One form is required per member.
- Existing ongoing adviser, brokerage, administration fee arrangements will continue. Your fund may incur external actuarial costs in the future.
- When converting funds from Pension to Super, we will not automatically transfer the beneficiary from your Pension account to your Super account. If you do not have a beneficiary on your Super account, please complete the relevant Beneficiary Nomination form, located on our website.

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

1. Fund and member details

superannuation fund name																									
account number																									
title	Mr	Mrs	Miss	Ms	Other																				
first name(s)																									
last name																									
date of birth		/		/																					
tax file number																									
postal address																									
suburb																									
phone (after hours)													phone (business hours)												
mobile													fax												
email																									

2. Account and transfer details

A. Amount to be transferred

Please select below the amount you would like to commute from Pension phase to Super:

Note that while there are outstanding transactions we will be prevented from giving effect to a request for a transfer of the full balance. Your request will not take effect until all outstanding transactions have settled.

Pension:

Account Based Pension

Transition to Retirement Income stream

Amount:

Entire balance

Partial amount by selecting one of the following methods:

commuting \$ from Pension phase to Super.

retaining \$ in Pension phase and transferring the rest to Super.

Mandatory: if you have selected **Partial amount** above, please specify the assets (including cash) to be transferred out of or remain in the existing account (depending on your election) or attach a list. *Missing or incomplete information may delay the processing of the switch of asset(s).*

Asset code	Asset name	Units	Date Acquired	Amount

- ▶ **Importantly, the date of transfer to Super will be the date the assets are transferred.**
- ▶ **Certain defined benefit pensions are not commutable.**

3. Trustee certification and instruction

I/We instruct Perpetual to transfer Pension assets for this member to Super:

member/trustee signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
member/trustee signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
member/trustee signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
member/trustee signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Company signatures

signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
full name	<input type="text"/>									
capacity	<input type="checkbox"/>	sole director	<input type="checkbox"/>	director						
signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
full name	<input type="text"/>									
capacity	<input type="checkbox"/>	director	<input type="checkbox"/>	company secretary						

**COMPANY
SEAL**