



THE SERVICE	
About the service	Our documentation caters for Account Based, Transition to Retirement and Market Linked (Complying) pensions and includes all relevant letters and minutes and pension agreement.
For more information	If you have any questions about the service or completing this form Visit our website superconcepts.com.au Call us on 1300 023 170 Email us at trusteeservices@superconcepts.com.au
APPLYING FOR THE SE	RVICE
Complete this form	 Please write clearly and use black pen to complete the form. Please mark boxes like this with a ✓ or ✗. Where you see a box like this skip to the section shown. Please ensure that you complete all required sections, provide all supporting documents and have signed and dated this form.
Return this form	By mail: SuperConcepts By email: trusteeservices@superconcepts.com.au GPO Box 9981, Adelaide SA 5001
1. FUND DETAILS	
Fund name	
ABN	
Was the existing Trust Deed	established or amended by SuperConcepts?
Yes	Please state the SuperConcepts Fund ID:
No	
Is the fund registered with the	ne ATO for PAYG withholding tax?
If no, do you want us to regis	ster the fund? Yes No
2. FUND TRUSTEE DETA	AILS
Individual Trustee/s -	Go to section 4 or Existing Trustee Company - Go to section 3

3. TRUSTEE COMPANY DETAILS (IF A COMPANY ACTS AS TRUSTEE FOR THE FUND)			
Full company name			
ACN			
4. FUND STRUCTURE			
MEMBER 1			
Capacity	Individual Trustee or Director of Trustee Company		
Name			
MEMBER 2			
Capacity	Individual Trustee or Director of Trustee Company		
Name			
MEMBER 3			
Capacity	Individual Trustee or Director of Trustee Company		
Name			
MEMBER 4			
Capacity	Individual Trustee or Director of Trustee Company		
Name			
5. MEMBER COMMENCING PENSION			
Name			
Residential address			
Date of birth			
Gender	Male Female		
Tax File Number	Note: Please refer to page 5 for our Tax File Number Collection Notice.		



6. TYPE OF PENSION				
Account-based		Under 60 or 60 plus		
Transition to Retirement Ac	ccount Based Pension - also known as a TRAP	Under 60 or 60 plus		
Market-linked income strea	am – also known as a Term Allocated Pension or TAP			
(a) Is this member already rece	giving a pension from the fund?	Yes No		
(b) If yes, please state the type	of pension			
	Date commenced	3		
(c) Is this pension to be commu	ited and the balance rolled over to establish a new pension?	Yes No		
(d) Is this pension to be commu	uted and the balance rolled back to accumulation?	Yes No		
Note: An additional fee of \$110 v	will apply for each commutation.			
7. CONDITION OF RELEAS	SE .			
For account based and marke	et linked pensions			
The member is 55 years of employment for ten or mo	age or more and has ceased employment (including self-energe hours per week	mployment) and does not intend to ever take up		
The member is 60 years of	f age or more and left an employer after his/her 60th birthd	lay		
The member is 65 years of	age or more			
The member is permanent	ly incapacitated			
The pension is to commen	ce with the member's unrestricted benefit only			
The member has died and	a Death Benefit Pension is to be commenced			
For transition to retirement pe	ensions			
The member has reached	preservation age and wishes to commence a Transition to R	Retirement Account Based Pension		
8. PENSION DETAILS				
Pension Commencement date				
Pension purchase amount \$				
Pension purchase amount is	The member's full balance in the Fund at the pension cor	nmencement date		
	Part of the members' balance in the fund at the pension of	commencement date		
Components of purchase amount	x free component \$			
Тах	xable component \$			
Is the tax-free threshold going	to be claimed (if pensioner is under 60 years of age)?	Yes No		
Is the pension purchase amou	nt from the direct rollover of a pension provided by another	er provider? Yes* No		
*If YES, please provide a copy	y of the ETP rollover statement and confirmation from the	previous pension provider.		
9. REVERSIONARY - ACCO	OUNT BASED & TRANSITION TO RETIREMENT PENS	SIONS		
Is the pension to be reversionary? Yes No				
If YES, please provide detail of reversionary pensioner (must be a dependant).				
Full name				
Date of Birth				
Relationship to pensioner				



10. MARKET-LINKED PENSION ONLY							
Pension te	rm Years or	Life expectancy					
The pension	on term is based on:						
	Non-reversion	ionary - single life					
	The term of the pension that can be nominated is between the pensioner's life expectancy on the date of commencement of the pension (rounded up to the next whole number) and the pensioner reaching age 100 (rounded up to the next whole number);						
	Reversionar						
	Full name						
	Date of birth						
Does the p	ensioner wish to nominate revers	sion to dependants (other than the pensioner's spouse)?	Yes No				
Full name							
Date of bir	th						
Relationsh	ip to pensioner						
11. FEES	(prices quoted are inclusive of	GST)					
			Fees				
Pension	commencement		\$440				
	commencement commutation and restart		\$550 and \$110 for each				
Pension Optiona	commutation and restart I — Hard copy delivery of docume						
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13. PRIMARY CONTACT DETAILS			
These details will be used for all correspondence, contact, delivery and billing purposes.			
Trustee	Nominated representative e.g. Adviser (please specify below)		
Name			
Company			
Dealer group			
Address			
Postal address			
Phone	Mobile Fax Fax		
Email			
14. CHECKLIST			
Before submitting your application, please ensure you have:			
Completed all tru	stee & member details (refer to sections 3 & 4)		
Nominated the co	orrect condition of release (refer to section 7)		
Specified pension	n details		
Included paymer	at details (refer to section 12)		
-	iding incomplete details will delay the processing of your application. Please ensure that you have completed all relevant sections and I information where required.		

15. PRIVACY NOTICE

We collect personal information from you, from other members of the fund or from a financial planner or broker. We collect your name, contact information, date and place of birth, and your gender.

We collect your personal information to provide SMSF administration services. We also collect and use your personal information for direct marketing purposes.

We may be required by law to collect your personal information. Various financial services laws may apply and include Corporations, Superannuation and Taxation Law.

Besides our staff, we share this information with:

- external service providers who both here and overseas, the countries where they are likely to be located can be accessed via our privacy policy
- regulators such as the ATO
- other members of your fund, your financial planner or broker (if any)
- anyone else you authorise or if required by law.

Providing some information is optional. If you choose not to provide required personal information, we'll be unable to provide the services you are applying for.

Our privacy policy available at superconcepts.com.au/privacy explains how you can access or update your personal information or make a complaint about a breach or potential breach of our privacy obligations. You can contact us at 1300 023 170.



16. TAX FILE NUMBER COLLECTION NOTICE

Under the Taxation and Superannuation Laws, we are authorised to collect, use and disclose your Tax File Number (TFN). If you transfer your superannuation to another SMSF administrator or fund, we will give them your TFN, unless you tell us not to in writing.

You do not have to give us your TFN, however by providing your TFN we can accept all permitted types of contributions, apply ordinary tax rates and it will assist to locate all your superannuation accounts, making it easier to combine accounts.

If you don't provide us your TFN:

- Contributions from your before-tax salary will be taxed at up to 47%
- You won't be able to make after-tax contributions to your super
- You may not receive any co-contributions to which you're entitled
- It may be more difficult to find your super if you change address without notifying us or to combine any multiple super accounts you

17. DECLARATION

By signing below, I, on behalf of the trustees of the Fund:

- declare that I am authorised to make declarations on behalf of the persons named in this application form;
- declare that the information completed on this Application Form is complete and to the best of my knowledge, accurate and correct. To the extent that any information is subsequently identified as incorrect or found to be omitted from this Application Form, I authorise SuperConcepts to correct any errors and complete any omissions on this Application Form, following my confirmation (either orally or in writing);
- acknowledge that I have read and understood the Terms and Conditions for the Service and the Service Material, as updated from time to time, and agree to be bound by them;
- have read and understood the Fee Schedule applicable for the Services, found at www.superconcepts.com.au as updated from time to time and agree to be bound by them:
- authorise the collection, use and disclosure of my personal information for the purpose of the assessment of the application and if accepted, the management and administration of services in which I have applied. I understand that unless I consent to the collection, use and disclosure of this information, SuperConcepts will not be able to process my application or deliver the relevant Service(s);
- understand that SuperConcepts may routinely disclose my personal information to third parties such as: organisations undertaking compliance functions of SuperConcepts' information; organisations maintaining SuperConcepts' information technology system; authorised financial institutions; organisations providing mailing and printing services and my nominated representative (if applicable); and,
- accept that SuperConcepts or any of its related bodies corporate may send me information about its services from time to time. I understand that I may notify SuperConcepts of my decision not to receive further information by contacting SuperConcepts directly.

Signature	X		
Print Name		Date	

Mailing address Phone 1300 023 170

GPO Box 9981 Email trusteeservices@superconcepts.com.au

Adelaide SA 5001 Website superconcepts.com.au

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