



CAVENDISH

REQUEST TO RE-SET TRANSITION TO RETIREMENT/ACCOUNT BASED PENSION

1. Fund details

Name of Fund _____

Contact name _____ Contact number _____

2. Member details

Surname _____ Given names _____

Date of birth ____ / ____ / ____.

Has the member satisfied a condition of release? Yes ☐ No ☐

If yes, please specify condition met:

- ☐ Attained Preservation Age (Non-commutable Pension)
- ☐ Over 55, Retired with no intention to re-enter the workforce
- ☐ Over 60 and Retired
- ☐ 65 or over
- ☐ Other (please specify _____)

3. Pension details

Re-Set Commencement date: 01 / 07 / Re-Set Expiry Date: 30 / 06 /.

Pension to be Re-Set (original commencement date): _____

Tax Free Threshold to be claimed for this? Yes ☐ No ☐ Not applicable (60 or over) ☐

Is Pension Reversionary? Yes (complete section 4) ☐ No (skip to section 5) ☐

(Default to non-reversionary if section 4 is not completed)



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4. Reversionary Details

Surname _____ Given names _____

Date of birth ____ / ____ / ____.

5. Transition to Retirement/ Account Based Pension 'Re-Set' Fee Structure

Account Based Pension Re-set

\$240 (per pension annually)

6. Member declaration

I hereby request that an Account Based Pension be commenced in accordance with my instructions above. I declare that the information provided on this form is complete and correct and that I understand the applicable fee structure relating to both the commencement and administration of the pension.

Signed _____ DD / MM / YYYY

Please return this form to:

Cavendish Superannuation
GPO Box 9981
Adelaide SA 5001