



CAVENDISH

# REQUEST TO COMMENCE 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

Commencement date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Amount used to purchase pension ☐ Entire available balance  
☐ Other amount (please specify) \$ \_\_\_\_\_

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) ☐

## 4. Reversionary Details

Surname \_\_\_\_\_ Given names \_\_\_\_\_

Date of birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## 5. Account Based Pension Fee Structure

Account Based Pension set up **\$560<sup>#</sup>**  
Second and Subsequent Account Based Pension set up **\$280 each<sup>^</sup>**

## 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  
**or fax to** (08) 8212 6747

<sup>#</sup> These fees are for the pension commencement only. Annual compliance administration fees in respect of funds in pension mode are as per our fee schedule available from our website  
**cavendishsuper.com.au**

<sup>^</sup> 50% discount applies to the second and subsequent pensions commencing on the same date within a fund where set-ups are prepared at the same time. Please complete and attach a separate application form for each pension

SMSF Operations Pty Ltd  
ABN 30 007 778 341 a corporate  
authorised representative of  
SMSF Administration Solutions Pty Ltd  
ABN 76 097 695 988 AFSL 291195

REF: ABPRF02/18