



SuperHelp Australia Pty. Ltd.

ABN 60 061 126 663

Pension Setup Application

Address: PO Box 208

Hurstville NSW 1481

Email: info@superhelp.com.au

Phone: 1 300 736 453

Fax: (02) 8456 5904

Unless a list of assets to be segregated is provided we will assume the assets providing the pension are pooled.

1. SMSF Name:	<input type="text"/>
2. SMSF Tax File Number:	<input type="text"/>
3. Address for Meetings:	<input type="text"/> <input type="text"/> <input type="text"/>
4. Contact Phone Number:	<input type="text"/>
5. Full Name of Pension Member:	<input type="text"/>
6. Member's Date of Birth:	<input type="text"/>
7. Member's Tax File Number:	<input type="text"/>
8. Eligible Service Period (Leave blank if unsure):	<input type="text"/>
9. Pension Start Date:	<input type="text"/>
10. Amount to Start Pension:	<input type="text"/>
11. Reversionary Pension? (Y/N):	<input type="text"/>
If "Y" , Name of Spouse:	<input type="text"/>
Spouse Date of Birth:	<input type="text"/>
Spouse's Tax File Number:	<input type="text"/>
12. Benefit components (Leave blank if unsure):	
Tax Free Component:	<input type="text"/>
Taxable Component:	<input type="text"/>



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The **default position** is to run the fund as **Unsegregated** unless specified to be Segregated.

Is the Fund to be Segregated: Yes / No

Investment Information - (If Segregated Assets Only)

List the Asset Classes (eg. Fixed Interest, Australian Equities, Property, etc.) & their Market Value at the date the pension is to be commenced

ASSET	MARKET VALUE



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I request SuperHelp Australia Pty. Ltd. to set up a pension based on the information provided by me above.

I have not received advice from SuperHelp Australia Pty. Ltd. regarding my decision to commence a pension.

Your Name:

Signature:

Date:

Mailing Address: