

## PAPSON LEGAL – PENSION ORDER FORM

### APPLICANT INFORMATION

Name of Firm: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Tick this box if you would like the documentation in hard copy (we will charge a small postage disbursement on top of our usual fee)

Tick this box if you would like us to invoice the fund's trustee

Tick the box below that indicates what pension documentation you would like to order:

Type of Documentation	
Commence account-based pension	<input type="checkbox"/>
Commence transition to retirement income stream	<input type="checkbox"/>
Roll-back existing pension	<input type="checkbox"/>

If the documentation required is not listed above, then please outline this below.

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### FUND INFORMATION

Name of Fund: \_\_\_\_\_

Please complete the trustee information below for **either** a corporate trustee or individual trustees.

#### CORPORATE TRUSTEE

Company Name: \_\_\_\_\_

Company ACN: \_\_\_\_\_

Registered Address of Company: \_\_\_\_\_

Full Names of Directors:

Director 1		Director 2	
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Director 3		Director 4	
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**OR INDIVIDUAL TRUSTEES**

Full Name and Home Address of Trustee 1:

\_\_\_\_\_

Full Name and Home Address of Trustee 2:

\_\_\_\_\_

Full Name and Home Address of Trustee 3:

\_\_\_\_\_

Full Name and Home Address of Trustee 4:

\_\_\_\_\_

**MEMBER INFORMATION**

List the information of the member that the pension relates to below.

Member 1 – list name and address below.

\_\_\_\_\_

Date of Birth of Member 1: \_\_\_\_\_ Tax File Number: \_\_\_\_\_

**BENEFIT DETAILS**

Commencement (or rollback) date of pension: \_\_\_\_\_

Components of pension

Tax-free Amount	\$	%
Taxable Amount	\$	%
<b>Total Amount</b>	<b>\$</b>	<b>100%</b>

How is the pension funded? Segregated assets  Unsegregated assets

Full name of Reversionary Beneficiary \_\_\_\_\_

Date of birth of Reversionary Beneficiary \_\_\_\_\_

*Once you have completed this form, please return it to Papson Legal by post (PO Box 1147, Armadale North, Victoria 3143) or email [legal@papsonlegal.com.au](mailto:legal@papsonlegal.com.au). Please contact our office on (03) 9078 4430 or email us if you require further assistance.*