

Pension Establishment

Pension Establishment Form Checklist	Required	Completed
Section A – Fund Details	All Cases	
Section B – Pension Member Details	All Cases	
Section C – Pension Details	All Cases	
Section D – Detail of Preparer of this form	All Cases	
Payment of Fee (\$330)	All Cases	
Forward the completed form (plus copy of the trust deed and relevant existing pension documents) to: MSCJ Superannuation Services PO Box 6339 MITCHELTON QLD 4053 Phone: 07 3354 4020 (1300 766 487) Fax: 07 3354 4021		

Section A: Fund Details

SMSF Details (Name only if administered by MSCJ Superannuation Services)	
Name of Fund:	
Fund Tax File Number:	
Fund ABN:	
Trustee/s of the Fund: Individual or Company Name & Name of Directors	

Section B: Pension Member Details

Pension Member Details (Name only if administered by MSCJ Superannuation Services)	
Name of Member:	
Member's Tax File Number:	___ / ___ / ___
Member's Date of Birth:	___ / ___ / ___
Member's Occupation	
Member's Condition of Release	

Section C: Pension Details

Pension Details	
Pension Type: <i>(Please use separate form if more than one pension commencing)</i>	
Account Based Pension	Yes / No
Transition to Retirement Pension	Yes / No
Pension Commencement Date: ___ / ___ / ___	
Is the members whole accumulation account to be used to commence the pension: Yes / No	
- If No, please specify the commencement pension amount:	\$ _____
Will the pension be the Minimum Pension Payment: Yes / No	
- If No, please specify the Annual pension amount:	\$ _____
Pension Funding Components (or detailed members statement at commencement of pension)	
Tax-Free Amount	\$ _____ %
Taxable Amount	\$ _____ %
Total Amount	\$ _____ 100 %
Frequency of Pension Payments: (Circle one)	Monthly / Quarter / Annual/AdHoc
Are segregated assets going to be used to support the pension: No (Default position) / Yes	
- If Yes, please specify the assets (or asset class/es) held to be used.	

Section D: Disclaimer

Important Information

MSCJ Superannuation Services has not provided any investment or other advice in relation to setting up this Pension. In the set-up process MSCJ Superannuation Service may be required to source document's, including but not limited to: trust deeds, trust deed updates and product disclosure statements, produced by a qualified legal practitioner. We fully disclaim any liability for reliance on such documents by the trustees (and/or any other individual and/or other entity).

Acknowledged and Signed by the person completing this form:

		___/___/___ Date
Signed	Print Name	
Role of this Person: Financial Planner / Trustee (Please Circle)		
Ph: _____	Fax: _____	
Email: _____		

Payment Details <i>(Payable prior to set-up unless approved purchaser)</i>	Price (inc GST)	
Pension Set-up	\$330	
	Total Payable	
Payment Options		
Cheque payable to MSCJ Superannuation Services		
Direct Credit Bank: Bank of Queensland BSB: 124-001 Account: 2169 4710 Please email admin@mscj.com.au when paid		