

# ORDERING CHECKLIST

## Income Stream Reversion Nomination Amendment

Outlined below is a checklist of the information needed to complete an Income Stream Reversion Nomination Amendment order.

### FUND DETAILS

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- ☐ Name of the Superannuation Fund
- ☐ Meeting address of the trustees of the Fund

### TRUSTEE DETAILS

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If the Fund has individual trustees:

- ☐ Full name of each individual trustee
- ☐ Full name of the chairman at the meeting of trustees

If the Fund has a corporate trustee:

- ☐ Name of the corporate trustee
- ☐ ACN of the corporate trustee
- ☐ Full name of each director of the corporate trustee
- ☐ Full name of the chairman of the company (*if applicable*)
- ☐ Registered address of the company

### PENSIONER DETAILS

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- ☐ Pension recipient's full name and address

### INCOME STREAM DETAILS

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- ☐ Type of income stream the pensioner is receiving
  - > Account Based Pension; or
  - > Transition to Retirement Income Stream
- ☐ Commencement date or unique identifier of the income stream
- ☐ Do you have a current Pension Agreement in place? If **yes**, please provide a copy.

### CURRENT REVERSIONARY BENEFICIARY DETAILS (IF APPLICABLE)

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- ☐ Full name of the current reversionary beneficiary
- ☐ Date of birth of the current reversionary beneficiary
- ☐ Is the change being made because of the death of the current reversionary beneficiary?

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### PENSION REVERSION NOMINATION CHANGE DETAILS

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- ☐ What change are you making to the existing pension reversion nomination? **(choose one)**
- > Cancel existing pension reversion nomination only;
  - > Cancel existing pension reversion nomination and nominate a new pension reversionary; or
  - > Nominate a new pension reversionary only *(if there is no current reversionary beneficiary nominated)*

#### Details of the New Reversionary Beneficiary

- ☐ Full name and address of the new reversionary beneficiary
- ☐ Date of birth and gender of the new reversionary beneficiary
- ☐ Relationship of the new reversionary beneficiary to the pensioner

Should you have any queries regarding this checklist, please contact the team at Topdocs on 1300 659 242.