

# ORDERING CHECKLIST

## SMSF Death Benefit Pension

Outlined below is a checklist of the information needed to complete an SMSF Death Benefit Pension 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

If the Fund has a corporate trustee:

- ☐ Name of the company
- ☐ ACN of the company
- ☐ Full name of each director of the corporate trustee
- ☐ Registered address of the company

### PENSION DETAILS

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- ☐ Name of the deceased member who's death benefits are being paid to the pension recipient as an account based pension
- ☐ Relationship between the deceased member and the pension recipient
- ☐ Pension recipient's full name and address
- ☐ Pensioner recipient's date of birth and gender
- ☐ If a reversionary beneficiary is nominated, their full name, address, date of birth, gender and relationship to the pension recipient

### PENSION COMPONENT DETAILS

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- ☐ Pension commencement date
- ☐ If the pension purchase price is known, the tax free and taxable components of the pension (note you can document the reset **without** knowing the pension purchase price)
- ☐ First year pension payment amount to be taken (this can also be unknown)
- ☐ Frequency of pension payments – weekly, monthly, quarterly, or annually

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