

DOCUMENTATION CONTENTS

Allocated Pension Conversion

Outlined below is the list of documents you will receive with your order.

FULL SERVICE DELIVERY

- > Review of the Fund's Trust Deed to ensure it has the required provisions to convert the existing Pension to an Account Based Pension
- > Application Form to convert the existing Pension
- > Trustee Minutes and letters converting the Allocated Pension
- > Member Pension Application Form
- > Detailed Pension Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Pension Commencement
- > All relevant calculations performed for you
- > Pension Summary Sheet

INSTANT EMAIL DELIVERY

- > Application Form to convert the existing Pension
- > Trustee Minutes and letters converting the Allocated Pension
- > Member Pension Application Form
- > Detailed Pension Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Pension Commencement
- > All relevant calculations performed for you
- > Pension Summary Sheet

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