

DOCUMENTATION CONTENTS

Complying Pension Reset

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 pay commute the existing Pension and to commence the new Market Linked Pension
- > Application Form to commute the existing Pension
- > Trustee Minutes and letters confirming the commutation of the existing Pension
- > Market Linked Pension Application Form
- > Detailed Market Linked Pension Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Market Linked Pension Commencement
- > All relevant calculations performed for you
- > Pension Summary Sheet

INSTANT EMAIL DELIVERY

- > Application Form to commute the existing Pension
- > Trustee Minutes and letters confirming the commutation of the existing Pension
- > Market Linked Pension Application Form
- > Detailed Market Linked Pension Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Market Linked 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.