

DOCUMENTATION CONTENTS

SMSF Death Benefit Pension

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 the Pension as a superannuation death benefit
- > Death Benefit Payment Notification
- > 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
- > Completion of required ATO documentation for Pensioner's under 60 years of age, including PAYG Registration for the Fund, and Tax File Number Declaration completion for the Pensioner

INSTANT EMAIL DELIVERY

- > Death Benefit Payment Notification
- > 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.