

DOCUMENTATION CONTENTS

SMSF 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 commute the existing Pension and commence the new Pension
- > Application Form to commute the existing Pension
- > Trustee Minutes and letters commuting the existing Pension
- > Member Account Based Pension / Transition to Retirement Income Stream Application Form
- > Detailed Account Based Pension / Transition to Retirement Income Stream Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Account Based Pension / Transition to Retirement Income Stream 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

- > Application Form to commute the existing Pension
- > Trustee Minutes and letters commuting the existing Pension
- > Member Account Based Pension / Transition to Retirement Income Stream Application Form
- > Detailed Account Based Pension / Transition to Retirement Income Stream Agreement
- > A Comprehensive Product Disclosure Statement
- > Trustee Minutes noting the Account Based Pension / Transition to Retirement Income Stream 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.