T O P D O C S . C O M . A U

# TOPDOCS

**PENSION COMMUTATION   
FULL SERVICE ORDER FORM**

To order your Pension Commutation documents:

1. Complete all relevant fields in BLOCK LETTERS
2. Attach a copy of the Fund’s most recent Trust Deed.
3. Mail this form, along with the documentation outlined above to Topdocs. Alternatiely, email this form and the required documentation to Topdocs at [**or**](mailto:orders@topdocs.com.au)[**ders@topdocs.com.au**](mailto:ders@topdocs.com.au)

**SECTION A (I): PERSON/ADVISER ORDERING DETAILS**

|  |  |  |
| --- | --- | --- |
| Name: | | Signature: |
| Company Name: | | |
| Postal Address: | | |
| Date Of Order:    /    / | | Your Ref: |
| Phone: (     ) -       - | Fax: (     ) -       - | Email: |

**SECTION A (II): PAYMENT DETAILS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enclosed is payment for Pension Commutation for the sum of: $ | | | | |
| Direct Debit\* | Visa | Mastercard | | Cheque |
| Card Holder Name: | | | | |
| Credit Card Number:      -      -      - | | | | |
| Expiry Date:    / | | | Authorised Card Signature: | |

\*To pay by Direct Debit you must have a current Direct Debit agreement with Topdocs. If you would like to arrange for Direct Debit for future purchases please contact Topdocs on **1300 65 92 42**

**SECTION B: FUND DETAILS**

|  |
| --- |
| Fund Name: |
| Address where the meetings of the Trustees are held: |

**SECTION C: TRUSTEE INFORMATION**

If the Trustee of the Fund is a Company, enter the Company details below:

|  |  |
| --- | --- |
| Corporate Trustee Name: | ACN:       -       - |
| Registered Address: | |
| Company Chairman: | |

Enter the details of the Individual Trustees, or if the Trustee is a Company, the Directors of the Corporate Trustee:

|  |  |  |  |
| --- | --- | --- | --- |
| **Trustee 1** | Name: | Individual Trustee | Director of Corporate Trustee |
| **Trustee 2** | Name: | Individual Trustee | Director of Corporate Trustee |
| **Trustee 3** | Name: | Individual Trustee | Director of Corporate Trustee |
| **Trustee 4** | Name: | Individual Trustee | Director of Corporate Trustee |

**SECTION D: DETAILS OF MEMBER RECEIVING BENEFIT**

|  |  |
| --- | --- |
| **Member** | Name: |
| Address: | |

**SECTION E(I): INCOME STREAM COMMUTATION DETAILS – SPECIFIC COMMUTATIONS**

Complete this section for commutation of a single income stream or multiple income streams where you wish to specify how each income stream is to be individually commuted.

Please select which income streams you wish to commute. If you are commuting multiple income streams which commenced on the same date, please note a unique identifier for each income stream.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Pension Type** | **Commencement Date |  Unique Identifier** | **Type of Commutation** | **Date of Commutation** |
| **1** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Commute the amount of $  Commute such an amount that will result in the balance of the pension to be no greater than $1.6 million  Commute such an amount that will result in the balance of the pension to be no greater than $  Fully commute the pension | /    / |
| **2** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Commute the amount of $  Commute such an amount that will result in the balance of the pension to be no greater than $1.6 million  Commute such an amount that will result in the balance of the pension to be no greater than $  Fully commute the pension | /    / |
| **3** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Commute the amount of $  Commute such an amount that will result in the balance of the pension to be no greater than $1.6 million  Commute such an amount that will result in the balance of the pension to be no greater than $  Fully commute the pension | /    / |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **4** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Commute the amount of $  Commute such an amount that will result in the balance of the pension to be no greater than $1.6 million  Commute such an amount that will result in the balance of the pension to be no greater than $  Fully commute the pension | /    / |

**SECTION E(II): INCOME STREAM COMMUTATION DETAILS – TIERED COMMUTATIONS**

Complete this section if you wish to tier the commutation of a number of income streams, so that the income streams are commuted in a set order until the aggregate pension balance for the member is either $1.6 million or another specific dollar amount.

If you are commuting multiple income streams which commenced on the same date, please note a unique identifier for each income stream.

|  |  |  |  |
| --- | --- | --- | --- |
| What date do you wish the commutations to be effective?  Please specify date:    /    /  30 June 2017 (default) | | | |
| The purpose is to ensure the balance of the remaining income stream or the combined balance of the remaining income streams as at the date of commutation is no greater than:  $1.6 million  Please specify amount: $ | | | |
|  | **Pension Type** | **Commencement Date |  Unique Identifier** | **Order of Commutation** |
| **1** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | First full or partial commutation |
| **2** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  OR  Unique Identifier: | Second full or partial commutation |
| **3** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Third full or partial commutation |
| **4** | Account Based Pension  Transition to Retirement Income Stream | Commencement Date:     /    /  **OR**  Unique Identifier: | Fourth full or partial commutation |