



**First Class**  
S U P E R

## Pension Establishment Request Form

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### Welcome to First Class Super

Please use this Pension Establishment request form to setup a new Account Based Pension or Transition to Retirement Pension. If you have any questions please do not hesitate to contact us.

Your completed application form can be provided to First Class Super either by email or mail

First Class Super  
PO Box 7525  
Beaumaris VIC 3193  
info@firstclasssuper.com.au  
03 8609 0199

#### Fees

Pension Establishment - **\$330** (incl GST)

#### Payment Details

Payment can be made by either mailing a cheque to First Class Super or by direct credit:

Account name: First Class Super Pty Ltd  
BSB: 182-512 Account No: 963022678

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### 1. Fund Information

Fund Name

ABN

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### 2. Member Commencing Pension

Family Name

Given Names

Date of Birth

Tax File Number

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### 3. Type of Pension

Is the member already receiving a pension that will be commuted and the balance used in the establishment of this new pension

- Yes  
 No

If yes, what date did the original pension commence?

The type of pension that will be commenced

- Account Based Pension - Go to Section 4  
 Transition to Retirement - Go to Section 5

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### 4. Condition of Release

Please confirm the Condition of Release to commence an Account Based Pension

- The member is 55 years of age or more and has ceased employment and does not intend to ever take up employment for 10 or more hours per week
- The member is 60 years of age or more and left an employer after their 60th birthday
- The member is 65 years of age or more
- The pension is to commence with only the member's unrestricted non preserved benefits
- Death benefit is to be commenced

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### 5. Pension Commencement Details

Pension Commencement Date

Pension Purchase Price

The Pension Purchase Price amount is

- The members full accumulation balance at the pension commencement date, OR
- Partial balance of the accumulation account

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## 6. Reversionary

Is the Pension to be reversionary

- Yes - Complete Details Below of Reversionary Pensioner (must be a dependant)
- No - Go to Section 7

Family Name

Given Names

Date of Birth

Relationship to Pensioner

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## 7. Declaration

Print Name

Signature

Date