Perpetual

Perpetual's DIY Super SMSF Service

Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

Convert to Account Based Pension

You will need to complete this form if you are a current member in the Self Managed Super Fund Service Allocated Pension and would like to convert your entire balance to a Self Managed Super Fund Service Account Based Pension. The Account Based Pension offers the new payment standards for pensions. You will not be able to convert part of your balance.

Members of the Self Managed Super Fund Service should read the current Perpetual's DIY Super Self Managed Super Fund Service Administration Service Guide (ASG) to understand the features of the Account Based Pension prior to completing this form.

You can obtain a copy of the ASG on our website at www.perpetual.com.au or call us on 1800 645 227. You should speak to your financial and/or tax adviser when considering this option.

Please complete this form using black ink, using BLOCK letters.

1. Current member details

Please provide the current details of your Self Managed Super Fund Service Allocated Pension

superannuation fund name

account number

member name

2. Transfer request

☐ I would like my Allocated Pension, noted in Section 1, to be converted to an Account Based Pension.

3. Change pension payments

Only complete this section if you wish to amend the amount of your pension payments. If no change is required we will continue to pay your previously advised amount provided it is above the minimum for your age. Please note that for Transition to Retirement Pensions, payments are restricted to a maximum amount of 10% of the account balance each year.

☐ minimum **OR** specify an amount (before tax) of: $ per payment

☐ maximum **(Please note that the maximum payment of 10% in any year referred to above is only applicable to Transition to Retirement Pensions)**

4. Declaration and applicant signature

I confirm that I have read and understood the features of the Self Managed Super Fund Service Account Based Pension available in the current ASG and request that my Self Managed Super Fund Service Allocated Pension be converted to the Self Managed Super Fund Service Account Based Pension.

name (please print)

trustee signature date / /

trustee signature date / /

trustee signature date / /

trustee signature date / /