



## Perpetual's DIY Super

Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315

This form can be used by members of the Self Managed Super Fund Service and members of the Small APRA Fund Service.

# PENSION TO SUPER COMMUTATION FORM

### Please note:

- One form is required per member.
- Existing ongoing adviser, brokerage, administration fee arrangements will continue. Your fund may incur external actuarial costs in the future.
- When converting funds from Pension to Super, we will not automatically transfer the beneficiary from your Pension account to your Super account. If you do not have a beneficiary on your Super account, please complete the relevant Beneficiary Nomination form, located on our website.

Please complete this form in black ink, using block letters.

## 1. Fund and member details

superannuation fund name					
account number					
title	Mr	Mrs	Miss	Ms	Other
first name(s)					
last name					
date of birth			tax file number		
postal address					
suburb					
phone (after hours)			phone (business hours)		
mobile			fax		
email					



Self Managed Super Fund members only to complete section 3.

### 3. Trustee certification and instruction

I/We instruct Perpetual to transfer Pension assets for this member to Super:

member/trustee signature	<input type="text"/>	date
member/trustee signature	<input type="text"/>	date
member/trustee signature	<input type="text"/>	date
member/trustee signature	<input type="text"/>	date

#### Company signatures

signature	<input type="text"/>	date	
full name			
capacity	sole director	director	
signature	<input type="text"/>	date	
full name			
capacity	director	company secretary	

## 4. Confirmations and undertakings

By signing this application form, I confirm that:

- I am an existing member of the fund and agree to be bound by the terms of the trust deed as amended from time to time and all relevant laws governing the fund.
- Perpetual may implement my investment recommendations upon receipt of clear instructions, as soon as is practicable to do so.
- I agree to provide Perpetual with any information requested in relation to the fund and will promptly notify Perpetual in writing of any change to the information in this application form.
- I acknowledge that Perpetual will hold personal information about me and will disclose this information to my adviser in relation to the investment described in this form. I acknowledge that Perpetual will cease to disclose this personal information if I notify Perpetual that the adviser no longer acts on my behalf.
- I understand that the pension I have selected will only continue to be paid while the available assets in my account supporting the pension remain adequate and that Perpetual has no liability, personal or otherwise, beyond these available assets.
- Perpetual is authorised to deduct all fees and charges on account of my membership in the fund.
- Perpetual may rely on any information my adviser provides and is not responsible for any errors or omissions made by that adviser.
- I have read and understand the latest Perpetual Small APRA Fund Service Product Disclosure Statement.
- I authorise Perpetual to quote my TFN or exemption to the Australian Taxation Office.
- I authorise a representative of Perpetual to obtain information from the Australian Taxation Office regarding my superannuation and/or pension account(s) in relation to my TFN, PAYG or other superannuation tax-related matters.

## 5. Member's signature

signature of member

date