

IMPORTANT: Please use BLOCK letters and black ink when completing this form.
This form should be used if you would like to add further funds to an existing Pension Account from an existing Superannuation Account.

1. EXISTING PENSION ACCOUNT DETAILS

Pension Account Number P
Mr/Mrs/Ms/Miss (mandatory) Surname (mandatory)
Given names (Mandatory)

2. ROLLOVER FROM AN EXISTING SUPER ACCOUNT

Superannuation Account Number S Effective Date / /
 Rollover Partial Amount to Pension Account Transferring \$

(Note: You must leave the minimum required balance of \$1000 to keep the Superannuation Account open)

3. VARIATION TO PENSION PAYMENT

Please nominate the pension amount the member wishes to receive (this may be subject to income tax)
tick appropriate box or add other payment amount

Minimum Payment Maximum Payment (Transition to Retirement Pension only)

First Payment Date 15 / /

Other Payment Amount \$ Frequency Monthly Quarterly Half Yearly Annually

4. ONCE-OFF PENSION PAYMENT

Payment Amount \$

Effective Date / /

Bank Account Details for the Pension Payment

Account Name BSB Account Number

5. ADVISERS AUTHORITY

I declare that all of the above details are correct

ADVISER TO SIGN HERE

DATED

/ /

HOW TO COMPLETE THE ROLLOVER REQUEST FORM

1. EXISTING PENSION ACCOUNT DETAILS

Complete this section in full for your existing Pension account details.

2. ROLLOVER FROM AN EXISTING SUPER ACCOUNT

Funds from the member's existing Superannuation Plan account to be added to the existing Pension amount to start a new Pension.

3. VARIATION TO PENSION PAYMENT AMOUNT

Complete this section only if you wish to change the amount and date of your pension payment you wish the member to receive.

4. ONCE-OFF PENSION PAYMENT

Complete this section if you wish to receive a once-off pension payment.

5. ADVISERS AUTHORITY

Only the adviser needs to sign and date the Declaration before returning this form.

Return completed original form to **DIY Master Limited PO Box 7540 GCMC QLD 9726**
or email scanned originals to powerwrap@diymaster.com.au