PENSION REVERSION NOMINATION	*Please complete all details in block letters*
Use to order documentation that ensures an existing pension is reversionary upon pensioner's death.	
Firm ordering (if applicable):	
Person ordering:	
Street address	
Postal address (if different):	
Phone:	Email:
Tick here ☐ if we are to invoice the fund's trustee (otherwise, our invoice will be made out to the person ordering)	
Documents will be delivered by email as PDF files	Tick here ☐ for hardcopy delivery (fee applies)

NAME OF FUND

Name of SMSF:

LEVEL OF SERVICE (select one)

☐ **Standard Documents**; or ☐ **Premium Service**	See important note on the bottom of page 3 for the difference

COMPANY TRUSTEE

Company name:			
ACN:			
Registered office:			
Full names of all directors			
T1		T2	
T3		T4	

OR, INDIVIDUAL TRUSTEES

T1	Full name:	
	Street address:	
T2	Full name:	
	Street address:	
T3	Full name:	
	Street address:	
T4	Full name:	
	Street address:	

MEMBER — PENSIONER DETAILS

Full name:

Residential address:

Should you require reversionary pension documents for more than one member, please complete a second order form. An additional fee will apply to provide reversionary pension documents for a second member.

REVERSIONARY PENSIONER

Full name:

Relationship to member — pensioner (eg, spouse, child, etc):

Residential address:

If there is more than one reversionary pensioner, please provide details below. If the reversionary pensioner is a child, note that the child must be either: under 18; under 25 and financial dependent on the pensioner; or have a disability of the kind described in s 8(1) of the *Disability Services Act 1986* (Cth).

PENSION DETAILS

P1	☐ Account-based pension	
	Pension start date (dd/mm/yyyy):	Pension ID (if any):
P2	☐ Account-based pension	
	Pension start date (dd/mm/yyyy):	Pension ID (if any):
P3	☐ Account-based pension	
	Pension start date (dd/mm/yyyy):	Pension ID (if any):
If pension is not an ABP please provide details in the Special Instructions section on page 3.		

MEMBERS		
M1	Full name:	Pensioner/T1? ☐
	Street address:	
M2	Full name:	T2? ☐
	Street address:	
M3	Full name:	T3? ☐
	Street address:	
M4	Full name:	T4? ☐
	Street address:	

DOCUMENT TRAIL (only if ordering premium service)

Please provide the following:

- A copy of the current deed which is dated (dd/mm/yyyy):
- The date of the establishing deed of the fund (dd/mm/yyyy):

    A copy of documentation commencing pension

SPECIAL INSTRUCTIONS

Note that DBA is not licensed to provide financial product advice under the *Corporations Act 2001* (Cth).

THE DIFFERENCE BETWEEN STANDARD DOCUMENTS AND PREMIUM SERVICE

The rules of equity provide that no trustee may fetter its discretion. Upon a member's death, typically trustees have a discretion as to whether to continue paying the deceased's pension to an appropriate dependant. Accordingly, where a trustee agrees that it will exercise that discretion in a certain way, this is a fettering of discretion. Such an act by a trustee is unenforceable. However, there is an important exception. A trustee's discretion may be fettered if the governing rules (typically contained in the fund's most recent trust deed) allow it. Accordingly, it is vital that:

- the governing rules be identified;
- all documentation is reviewed to ensure that it has been correctly drafted and correctly executed;
- the current governing rules allow discretion to be fettered by way of a reversionary nomination; and
- any deficiencies be appropriately dealt with.

Unless the above process is undertaken, a reversionary nomination may not be valid. Moreover, there may be more legally effective means of documenting a reversionary pension. As part of our premium service we perform the above tasks to provide feedback on any further work that may be needed. However, if you order the standard documents, we do not perform these tasks and take it that another qualified professional will perform them. Generally, performing the above tasks constitutes legal services and hence only a lawyer should charge for doing this.