

MAKING A PENSION NON-REVERSIONARY		<i>Please complete all details in block letters</i>
<i>Use to order documentation that ensures an existing pension payable to an SMSF member is non-reversionary upon pensioner's death.</i>		
Firm ordering (if applicable):		
Person ordering:		
Street address		
Postal address (if different):		
Phone:	Email:	
Tick here <input type="checkbox"/> 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 <input type="checkbox"/> for hardcopy delivery (fee applies)	

NAME OF FUND
Name of SMSF:

LEVEL OF SERVICE (select one)	
<input type="checkbox"/> Standard Documents; or <input type="checkbox"/> 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 documents for more than one member, please complete a second order form. An additional fee will apply to provide documents for a second member.

REVERSIONARY BENEFICIARY TO BE REMOVED (IF KNOWN)

Full name:

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

PENSION DETAILS

P1	<input type="checkbox"/> Account-based pension	
	Pension start date (dd/mm/yyyy):	Pension ID (if any):
P2	<input type="checkbox"/> Account-based pension	
	Pension start date (dd/mm/yyyy):	Pension ID (if any):
P3	<input type="checkbox"/> 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? <input type="checkbox"/>
	Street address:
M2	Full name: T2? <input type="checkbox"/>
	Street address:
M3	Full name: T3? <input type="checkbox"/>
	Street address:
M4	Full name: T4? <input type="checkbox"/>
	Street address:

DOCUMENT TRAIL (only if ordering premium service)
<p>Please provide the following:</p> <ul style="list-style-type: none"> • 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 pension commencement documentation

SPECIAL INSTRUCTIONS
Note that DBA is not licensed to provide financial product advice under the <i>Corporations Act 2001</i> (Cth).

THE DIFFERENCE BETWEEN STANDARD DOCUMENTS AND PREMIUM SERVICE
<p>To make an existing automatically reversionary pension non-reversionary, or to otherwise remove a nominated reversionary beneficiary, the governing rules and pension documents must empower the trustee of the fund to change the reversionary nature of the pension. Accordingly, it is vital that:</p> <ul style="list-style-type: none"> • the governing rules be identified; • all documentation is reviewed to ensure that it has been correctly drafted and correctly executed; and • any deficiencies be appropriately dealt with. <p>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.</p>