Level 2, 290 Coventry Street (PO Box 2085)
South Melbourne Vic 3205
Ph: (03) 9092 9400
dba@dbalawyers.com.au www.dbalawyers.com.au
DBA Lawyers Pty Ltd ACN 120 513 037

PENSION COMMUTATION DOCUMENTS TO FULLY COMMUTE A MARKET LINKED PENSION, COMPLYING LIFETIME PENSION OR LIFE EXPECTANCY PENSION

Please return the completed form with relevant documentation to dba@dbalawyers.com.au

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:
Please provide a complete PDF copy of the executed/signed trust deed containing the latest governing rules for the SMSF.

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 (*Please only enter the member who is having a pension commuted. We do not need to know the details of any of the other members)*
M1 - Full name:
Street address:

COMMUTATION DETAILS		
What type of pension is being commuted	☐ Market Linked Pension — Capped defined benefit income stream (**CBDIS**)* *or* ☐ Market Linked Pension — Non-CDBIS *or* ☐ Complying Lifetime Pension *or* ☐ Life Expectancy Pension	
*NB: Due to the special transfer balance account rules governing the debit value of a commuted CDBIS MLP, it may not be possible for the member to commence a new account-based pension. In some cases, an excess transfer balance position may also arise. Expert advice should be obtained if there is any doubt whatsoever in this regard.		
What date did the existing pension being commuted commence?	Insert date: _ _ _ _ _ _ _ _ _ _ _ _ _ *or* Not sure: ☐	
NB: You do not need to tell us what day the pension is commuted. This date is left blank for the client to fill in before completing the documents.		
Is the dollar value of the amount being fully commuted known?	The Commutation Amount is the following dollar amount (eg, $400,000): _ _ _ _ _ _ _ _ _ _ _ _ _ (insert $) *or* Not sure: ☐	
What will occur with the Commutation Amount?		☐ Rolled back into accumulation *or* ☐ Cashed as a lump sum

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

IMPORTANT INFORMATION
If you leave out instructions when completing this form, we will leave that part of the schedule blank and issue the documents for you to complete those aspects before signing.