

SMSF pensions (account based pension and TRIS) order form

Please complete this form and email to Phil Broderick at pbroderick@sladen.com.au, fax to (03) 9620 9288, or call (03) 9611 0163 to chat to Phil directly. You will be sent an invoice for payment after we receive this form.

Contact <i>(enter your contact details here)</i>	
Name	
Firm	
Telephone	
Client <i>(enter your client's contact details here)</i>	
Full name	
Address	
Telephone	
Co-branding Would you like the new deed to be co-branded with your details? If so, please complete the below information.	
Firm Name	
Firm Address	
Firm Telephone	
Firm Email	
Firm Contact Name	
Firm Reference	
Fund Details	
Name of Fund	
Date of deed establishment and variation(s)	
Trustee of Fund	
Full name	
ACN <i>(if applicable)</i>	
Address	
Directors <i>(if applicable)</i>	

Chair <i>(if applicable)</i>	
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Trustee will execute documents as:		
Natural person	<input type="checkbox"/>	
A company will execute documents in one of the following ways in accordance with its constitution:	With seal	Without seal
Director and second director or secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/>	<input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/>	<input type="checkbox"/>

Pension Details

Member(s) name and address	
Type of pension	
Term of pension	
Amount of member's benefit to be allocated to pension	
Reversionary pensioner(s) <i>(if any)</i>	
Commencement date of the pension	

Guardian

Note: The Guardian has certain powers and rights under the Sladen Legal fund deed and is an important option for succession planning. If you would like to discuss the guardian role and options for structuring the guardian role, please contact us. If your super fund does not have a guardian role then this section should not be completed.

Full name(s)	
ACN <i>(if applicable)</i>	
Address	
Director(s) <i>(if applicable)</i>	
Chair <i>(chair of directors /trustees)</i>	

Guardian will execute documents as:	
Natural person	<input type="checkbox"/>
A company will execute documents in one of the following ways in accordance with its constitution:	With seal
Director and second director or secretary	<input type="checkbox"/>
Sole director and sole secretary	<input type="checkbox"/>
Sole director and no secretary	<input type="checkbox"/>