

Pension Pack Information Checklist

- The name of the SMSF from which the pension will be paid

- The date and place of the meeting at which the trustee(s) will resolve to pay the pension

- The names of the people who will be present at the trustee's meeting

Who will chair that meeting

- The name and address of the trustee(s)

If the trustee is a company:
 - its ACN
 - its registered office

- The name, address, gender and birth date of the member for whom the pension is being set up

- The type of pension the member will be paid:
 - simple pension
 - transition to retirement simple pension

- Whether the member wants to nominate a reversionary beneficiary from the beginning or leave it till later in a death benefit notice

- The name, date of birth and gender of any reversionary beneficiary

- How often the member wants to receive their pension payments, eg weekly, fortnightly, monthly, every 2 months, quarterly or annually



To create the documents to form a Pension Pack, you need to provide the information listed to the left. You might like to print this checklist out and gather the information before you start online.

Client Notes

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Any questions? Call our helpline on 1300 307 343

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- Whether the member wants to receive their pension payments in advance or arrears

- The date of which the member wants to receive their first pension payment

Printing and Binding

- For an additional \$49.50, do you want Cleardocs to print, bind and express courier deliver these documents to you?

Client Notes