



CAVENDISH

REQUEST TO COMMENCE ACCOUNT BASED PENSION

1. Fund details

Name of fund MCCLEARY SUPER FUND
Contact name JAMIE ANDREW Contact number 07 3006 7209

2. Member details

Surname MCCLEARY Given names IAN ALFRED
Date of birth 14/03/1938

Has the member satisfied a condition of release Yes ☐ No ☐

If yes, please specify condition met ☐ Attained Preservation Age (Non-commutable Pension)
☐ Over 55, Retired with no intention to re-enter the workforce
☐ Over 60 and Retired
☒ 65 or over
☐ Other (please specify) _____

3. Pension details

Commencement date 31/01/2013

Amount used to purchase pension ☒ Entire available balance
☐ Other amount (please specify) \$ _____

Tax Free Threshold to be claimed for this? Yes ☐ No ☐ Not applicable (60 or over) ☒

Is Pension Reversionary? Yes (complete section 4) ☒ No (skip to section 5) ☐

4. Reversionary Details

Surname MCCLEARY Given names SHIRLEY MARGARET
Date of birth 06/01/1939

5. Account Based Pension Fee Structure

Account Based Pension set up **\$560***
Second and Subsequent Account Based Pension set up **\$280 each***

6. Member declaration

I hereby request that an Account Based Pension be commenced in accordance with my instructions above. I declare that the information provided on this form is complete and correct and that I understand the applicable fee structure relating to both the commencement and administration of the pension.

Signed J R McCleary 12/03/2013

Please return this form to Cavendish Superannuation Pty Ltd, GPO Box 9981, Adelaide SA 5001
or fax to (08) 8212 6747

* These fees are for the pension commencement only. Annual compliance administration fees in respect of funds in pension mode are as per our fee schedule available from our website cavendishsuper.com.au

^ 50% discount applies to the second and subsequent pensions commencing on the same date within a fund where set ups are prepared at the same time. Please complete and attach a separate application form for each pension

Cavendish Superannuation Pty Ltd
ABN 30 007 778 341
AFSL No 2/6133

REF: ABPRF05/10