

# Convert your Transition Pension

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Use this form to to convert your Transition Pension to a Control or Managed Pension.

## Important information

- Before you complete this form, you should read our *Pension guide* available at [spiritsuper.com.au/pds](https://spiritsuper.com.au/pds) and consider whether a Control or Managed Pension is appropriate for your personal circumstances.
- You should seek personal advice to confirm if this request will have tax or social security implications.
- The transfer balance cap is a limit on how much super can be transferred into retirement income products like the Managed Pension and Control Pension. Tax penalties may apply if you exceed the cap.
- Your pension will continue to be paid to the same bank account that your Transition Pension is paid.
- We may need to make an additional pension payment before we change your pension to ensure you meet minimum requirements.
- Your current beneficiary nomination in your Transition Pension will be applied to your new Control or Managed Pension. If you'd like to change your nomination, our forms are available at [spiritsuper.com.au/forms](https://spiritsuper.com.au/forms), or contact us for more information.
- If you want to add money to your pension account, contact us before completing this form.

## Section 1 Your details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

First name

Middle name/s

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email



## Section 2

### Are you eligible to convert?

Place an X in the box below that applies to you. Select one only.

I've reached my preservation age (see table below) and have permanently retired. I don't intend to work again for 10 or more hours a week.

Date of retirement (DD MM YYYY)

I'm aged 60–64 and have ended an employment arrangement since turning 60.

Date your employment arrangement ended (DD MM YYYY)

If you can't tick one of the boxes above, you may not be eligible to convert your Transition Pension.

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60

## Section 3

### Do you want a Control or Managed Pension?

Tell us if you want a Control Pension or a Managed Pension. Select one only.

I want a Control Pension

Your current pension payments and investments in your Transition Pension will continue in your Control Pension. You can update these at any time.

OR

I want a Managed Pension

Converting to a Managed Pension will change your pension payments and investments.

With a Managed Pension, your fortnightly pension amount and investments are set for you, aiming to provide you with stable, regular payments until age 90 (but this isn't a guarantee), which are generally indexed to keep pace with inflation.

We'll confirm the details of your investments and how much you'll receive as your fortnightly pension once your Managed Pension has been set up.

## Section 4

### Member declaration

I authorise Spirit Super to convert my Transition Pension. By signing this form I acknowledge that:

- I've fully read and understood this form, and the information I've provided is true and correct
- I've read and understood the latest *Pension guide* available at [spiritsuper.com.au/pds](https://spiritsuper.com.au/pds) and agree to be bound by it
- I'll be bound by the policies, procedures, trust deed and rules that govern Spirit Super and relevant laws
- the trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made
- I understand Spirit Super may make enquiries to verify the answers I've given, including confirming information I've provided with my employer
- my first payment will be made in the next available payment run
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at [spiritsuper.com.au/privacy-policy](https://spiritsuper.com.au/privacy-policy) or by calling us on 1800 005 166.

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form to [info@spiritsuper.com.au](mailto:info@spiritsuper.com.au) or Spirit Super, GPO Box 1547, Hobart TAS 7001.

