

13 October 2010

Adviser bulletin

Easy conversion of transition to retirement pensions

We have upgraded our Private Super Fund so that, now, there is no need to re-start the original pension for clients who have a transition to retirement pension and have met any of the following conditions of release:

- reaching preservation age and providing us with a retirement declaration, or
- providing us with confirmation that employment has been terminated after reaching age 60, or
- reaching age 65.

Now, we automatically update your client's account to reflect their entire account balance as unrestricted non-preserved. This means less paper work for you and your client retains their original account number and are no longer subject to the 10 per cent maximum cashing rule.

If you have any questions, please contact the Client Services Team on 1800 254 180.

Yours sincerely



Client Services
Australian Executor Trustees Limited



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