

**Please return original, single sided, signed forms via post to PO Box 1096 Unley SA 5061**

If you have any further questions please call 08 8357 7840

## PERSONAL DETAILS

MANDATORY \*

\* Name: \* Female \* Male \* Date of birth:

\* Address:

\* Best daytime contact telephone:

\* Email: \*Occupation:

Married: No ☐ Yes ☐

If Yes, spouse's name: Date of birth:

\*Residency: Permanent ☐ OR Temporary ☐ OR Australian citizen ☐

\* Date you arrived in Australia with intention to stay permanently (or date of return for expats):

(This will be assumed to be your date of first Australian tax residency)

Date of last United Kingdom residency:

\* Is your total Australian annual taxable income from all sources greater than \$18,200? ☐ Yes ☐ No

Have you made any Non Concessional (after tax personal) contributions to an Australian superannuation fund in the last 3 financial years: ☐ No ☐ Yes If yes, please list the amounts and the dates they were made:

Existing Australian Super Fund Details	Owner	Estimated Current Balance
Fund Name	You / Spouse	\$
Fund Name	You / Spouse	\$
Fund Name	You / Spouse	\$
Fund Name	You / Spouse	\$

### Specific Goals and Objectives relating to a potential UK Pension transfer

If you were to consider a transfer of your UK Pension to Australia please indicate which of the following issues are important to you (mandatory):

- ☐ having your pension in the country you are living in
- ☐ avoiding currency risk on your pension benefits
- ☐ structuring your retirement benefits in a tax effective manner
- ☐ accessing the capital within your pension at retirement
- ☐ Controlling or influencing the investments under your pension arrangements
- ☐ maximising your potential death benefits before and after your retirement

Comments

# LETTER OF AUTHORITY

IMPORTANT: If you have more than one fund you must complete a separate Letter of Authority for each fund - please copy this page as required.

## To whom it may concern

Please accept this letter as my authority for you to release information concerning my pension entitlement to:

FinSec Partners - Tel: +61 8 8357 7840    Fax: +61 8 8373 7600  
PO Box 1096 Unley SA 5061. E-mail: ukpensions@finsecpartners.com.au

Please also accept this letter as my authority for you to update your records to reflect my correct address details as shown below:

MANDATORY \*

\* Signed: \_\_\_\_\_ \* Date: \_\_\_\_\_

\* Name: \_\_\_\_\_ \* Date of birth: \_\_\_\_\_

Maiden name if applicable: \_\_\_\_\_

\* Address: \_\_\_\_\_

\_\_\_\_\_  
Last UK address: \_\_\_\_\_

\_\_\_\_\_  
\* Name of UK pension fund or employer (if possible, please enclose a copy of your latest statement): \_\_\_\_\_

\_\_\_\_\_  
Address of UK pension fund or employer: \_\_\_\_\_

\_\_\_\_\_  
Period of fund or scheme membership (eg: May 1984 to May 1996): \_\_\_\_\_

\_\_\_\_\_  
Policy or Reference Number: \_\_\_\_\_

\_\_\_\_\_  
\* National Insurance Number: \_\_\_\_\_