

Starting an SMSF pension checklist

| 1 | Eligibility Date completed: |
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| 2 | Check your trust deed Date completed: |
| 3 | Value the assets Date completed: |
| 4 | Understand the transfer balance cap Date completed: |
| 5 | Get across event-based reporting Date completed : |
| 6 | Understand the minimum pension amount Date completed: |
| 7 | Apply to commence a pension Date completed : |
| 8 | Minute the commencement Date completed: |
| 9 | Commence paying the pension Date completed: |
| 10 | Supply the product disclosure statement (PDS) if required Date completed : |
| 11 | Obtain an actuarial certificate if required Date completed: |