

Starting an SMSF pension checklist

1 Eligibility

Date completed :

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 :