

1 December 2017

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Netwealth Superannuation Master Fund

Notification of changes to Transition to Retirement Income Stream

We are writing to inform you about an important change to reversionary pensioner rules on Transition to Retirement Income Streams (TTRs) and you may wish to consider whether any change to your beneficiary nominations are necessary.

You have nominated a reversionary pensioner on your account to continue to receive income payments if you pass away. The change requires that a reversionary pensioner you nominate meets certain conditions at the date of your death for the death benefit income stream to continue to be paid to them. If the reversionary pensioner has not met these conditions, the death benefit will not be paid to them as an income but rather it will be paid as a lump sum to your legal personal representative, as part of your estate.

To meet the required conditions a reversionary pensioner must have either reached age 65 or satisfied one of the retirement, terminal medical condition or permanent incapacity conditions of release that are generally required for release of superannuation benefits, and must have notified us that they have done so.

We have provided this notice for your information. You do not have to do anything in response to this change however you may wish to review your beneficiary nominations. This area of superannuation law is complex, you should consult with your financial adviser.

An updated document reflecting these changes is available on our website (Information Guide 11: Death Benefits) or by contacting us directly on 1800 888 223.

More information

For more information please contact Investor Services on Freecall 1800 888 223 or via email to contact@netwealth.com.au

Thank you for using Netwealth.

Your Details

Account name
Sample

Client number
Sample

Account number
Sample

Adviser Details

Adviser name
Sample

Phone number
Sample

For more information

 1800 888 223

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