

Starting an SMSF pension checklist

For explanatory notes, see:

<https://www.superguide.com.au/smsfs/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: _____