

Transition to Retirement – Fact find

The information in this form is required to complete a transition to retirement strategy.

Client Name					
Date of Birth					
Retirement Age					
Salary/Income					
Risk Profile: (circle one)	Defensive	Moderate	Balanced	Growth	High Growth

Current superannuation details

Superannuation balance	\$ _____
Tax free amount	\$ _____

Current income details

Salary (income from work excluding SG)	% _____ pa	Other taxable income	% _____ pa
Existing salary sacrifice	% _____ pa	Share Dividend & franking level	\$ __ pa frank ____ %
Super guarantee (as a % of salary)	% _____ pa	Tax deductions	% _____ pa
Non-concessional contributions	% _____ pa		

Transition to retirement pension details

Amount to roll into the TTRP	ALL or \$ _____
% income to draw down from TTRP (between 4 - 10%)	Optimise or set % _____ pa
Super guarantee (as a % of salary)	_____ % pa

The software will determine how much to salary sacrifice based on the level of net income required by the client. Select which analysis your client requires.

Enter “variable” fees and contributions in below - **all other fees are entered by Midwinter**

Platform Fees	Super	Pension
Exit Fees (% or \$)		
Contribution Fees (%)		
Review/Adviser Fees (% or \$)	\$_____pa	
Insurance Premiums (first yr premiums)	\$_____pa	
Contributions		
Super Guarantee (as % of income)	%_____pa	
Non-concessional	\$_____pa	
Concessional (\$ or as % of income)	\$_____pa	

Any other comments about the product fees? _____

If you would like Midwinter’s para-planning team to complete your statement of advice/insert, please fax this transition to retirement request form to Midwinter on (02) 9233 4485.

(Contact Midwinter for pricing - you will be invoiced at the end of the month).

You can talk to Midwinter’s friendly Help Desk on 1300 882 938.