

GETTING STARTED

There can be significant financial advantages to be gained by transferring your UK personal and company pension funds to Australia. It's simply a case of 'the sooner the transfer, the better'. Once in the Australian system your funds will benefit from favourable tax treatment now and even more so in retirement:

- ✓ **Pay NO TAX in retirement**
- ✓ **Access to lump sums anytime in retirement**
- ✓ **Control the investment of your funds now and in retirement**
- ✓ **Protect your estate by leaving your funds to your family**
– not your UK pension provider

Global Destiny charge NO UPFRONT fees whatsoever to prepare you an individually tailored FREE UK Pension Fund Transfer Report, meaning there has never been a more opportune time to do it.

Step 1 – Complete your Letter of Authority

To get started, you simply need to complete the attached Letter Of Authority and return it to the address shown below. If you have more than one UK pension fund, please remember to complete a separate Letter Of Authority for each fund and if available, please include a copy of a recent statement from your UK pension fund provider:

Please return to:

Global Destiny Pty Ltd
GPO Box 573
Brisbane QLD 4001

Step 2 – Free UK Pension Fund Transfer Report

Once we receive your completed Letter Of Authority, we will write to your UK pension fund provider and request the necessary information to prepare your individually tailored FREE UK Pension Fund Transfer Report.

If you have any questions when completing the Letter Of Authority please telephone our office on 1300 303 573 or email info@globaldestiny.com.au

Does not apply to the UK State/Government Pension



LETTER OF AUTHORITY

Dear Sir / Madam

I confirm that I have authorised the following company to obtain information on my behalf in relation to my policy account shown below. Would you please provide the company with the required information when requested.

Global Destiny Pty Ltd

GPO Box 573
Brisbane QLD 4001
AUSTRALIA

T. +61 7 3118 6060
E. info@globaldestiny.com.au
W. www.globaldestiny.com.au

Title <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms Other _____	
Name	
Date of Birth <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Defacto	
National Insurance Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Address	
	Postcode
Email	
Telephone Home _____ Work _____ Mobile _____	
Please indicate the date you first arrived in Australia <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<small>Notes: For migrants to Australia, generally this should be the date you arrived in Australia. For Australian citizens, this should be the date you returned from the UK.</small>	
Please indicate the date you were last a resident of the UK <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<small>Note: This is the day before migrating to Australia and / or leaving the UK.</small>	
Residency Status <input type="checkbox"/> Citizen <input type="checkbox"/> Permanent <input type="checkbox"/> Temporary	
Name of UK Pension Fund	
Address	
	Postcode
Policy Number or Reference Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Type of UK Pension Fund <input type="checkbox"/> Company <input type="checkbox"/> Personal <input type="checkbox"/> AVC <input type="checkbox"/> FSAVC <input type="checkbox"/> SIPP <input type="checkbox"/> SSAS <input type="checkbox"/> Other	
Signature	
	Date <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

