

**PENSION UNIT – NOTIFICATION LETTER**

**Notification to Kaplan Pooled Superannuation Trust Fund**

Name of Investor Entity:

Investor Number (for existing unitholders):

**Application**

Number of new units or dollar value of *pension units applied for* which are segregated current pension assets of the investor:

**Transfer In**

Number of existing accumulation units *to be transferred into pension units* which are segregated current pension assets:

**Transfer Out**

Number of existing *pension units that cease to be* segregated current pension assets:

The Investor’s entity hereby declares that the application for pension units is in accordance with the status of segregated pension assets of the Applicant’s regulated superannuation fund.

Signature

Print name

Signature

Print Name

Date