## SAMPLE LETTER TO TRUSTEE

*Insert Date Here*

Dear <Trustee Name>

# Re: Account based pension Benefits

Further to your advice regarding the income stream requirements for the year ending 30 June <<Year-end>>, I have set out below the required pension amount and the manner of payment to be applied:

Payment Required: $ ............... *(must be at least Minimum pension amount)*

Payment Frequency: ............................. *(weekly, monthly, annually on the 30 June)*

Payment to be made by way of .................... *(direct debit, cheque)* made out to

.................................................................................................. *(member name)*

at the ..................................... *(bank or institution name & address)*

account number ..................................

Should you have any queries please do not hesitate to contact me.

Yours sincerely,