

Beryl Uhlmann  
UHLMANN SUPERANNUATION FUND  
4 Moyston Court, Thornlands, Queensland 4164

Dear Sir/Madam

**UHLMANN SUPERANNUATION FUND**  
**Continuation of Account Based Pension**

We have recently completed a review of the assets of **UHLMANN SUPERANNUATION FUND** and your Account Based Pension account in the Fund as at 01 July 2020. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Account Based Pension, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2021.

Your balance contains:

- a Taxable Balance of: \$165,906.51; and
- a Tax Free Balance of: \$111,699.01

Tax Free proportion: 40.23%.

Your Minimum income stream applicable is \$9,720.00.

If you have any queries with regard to the above, please do not hesitate to contact me.

Yours sincerely

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Beryl Uhlmann  
4 Moyston Court, Thornlands, Queensland 4164

**UHLMANN SUPERANNUATION FUND**

**Minutes of a Meeting of the Trustee(s)**

held on \_\_\_\_\_ at 4 Moyston Court, Thornlands, Queensland 4164

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**PRESENT:** Beryl Uhlmann and Stephen Bernoth

**PENSION CONTINUATION:** Beryl Uhlmann wishes to continue existing Account Based Pension with a commencement date of 01/07/2007. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2020 \$277,605.52, consisting of:

- Taxable amount of \$165,906.51; and
- Tax Free amount of \$111,699.01
- Tax Free proportion: 40.23%.

**TRUSTEE ACKNOWLEDGEMENT:** It was resolved that Trustee(s) have agreed to this and has taken action to ensure the following:

- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The fund's trust deed provides for payment of this pension to the member
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount each year

**PAYMENT:** It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$9,720.00 in the frequency of at least an annual payment.

**CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.

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Beryl Uhlmann  
Chairperson