

01 July 2020

Mrs Judith Brooks  
39/11 Grant Avenue  
Hope Island, Queensland 4212

Dear Sir/Madam

**Brooks Family Superannuation Fund  
Commutation of Account Based Pension**

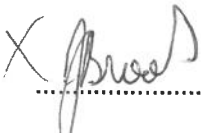
I hereby request the trustee(s) to commute the account(s) listed below into an existing accumulation account on 01/07/2020

Account Code: BROJUD00001P  
Account Description: ABP 2  
Balance to Commute: \$67,035.84

Account Code: BROJUD00002P  
Account Description: ABP 1  
Balance to Commute: \$582,428.63

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

Yours sincerely

A handwritten signature in cursive script, appearing to read 'J Brooks', is written over a horizontal dotted line.

Mrs Judith Brooks  
39/11 Grant Avenue  
Hope Island, Queensland 4212

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

held on 01 July 2020 at 39/11 Grant Avenue, Hope Island, Queensland 4212

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**PRESENT:** Judith Brooks and Rebecca Blayney

**PENSION COMMUTATION:** Judith Brooks has requested to commute the following account(s) to an existing accumulation account on 01/07/2020.

Account Code: BROJUD00001P  
Account Description: ABP 2  
Balance to Commute: \$67,035.84

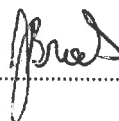
Account Code: BROJUD00002P  
Account Description: ABP 1  
Balance to Commute: \$582,428.63

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

- The Member's balance(s) has been updated for any contributions, withdrawals and earnings
- The fund's trust deed provides for the transfer to take place
- Any existing pensions for the above mentioned accounts have been ceased and that the pro-rated minimum amount has been met where necessary

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

X  
.....  
Judith Brooks  
Chairperson



01 July 2020

Mrs Judith Brooks  
39/11 Grant Avenue  
Hope Island, Queensland 4212

Dear Judith Brooks

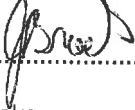
**Brooks Family Superannuation Fund  
Commutation of Account Based Pension**

We confirm that the full commutation of your Account Based Pension (BROJUD00001P) and Account Based Pension (BROJUD00002P) has been completed.

An amount of \$649,464.47 has been transferred to your accumulation account.

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

Yours sincerely

X   
.....

Mrs Judith Brooks  
Trustee  
39/11 Grant Avenue  
Hope Island, Queensland 4212

07 March 2022

Judith Brooks  
39/11 Grant Avenue  
Hope Island, Queensland 4212

Dear Sir/Madam

**Brooks Family Superannuation Fund  
Commencement of Account Based Pension**

I hereby request the trustee to commence a Account Based Pension with a commencement date of 01/07/2020 with \$665,516.23 of the superannuation benefits standing to my member's account in the fund. The pension does not have a reversionary beneficiary.

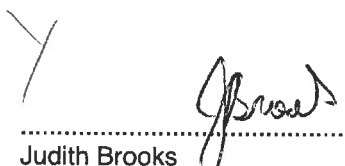
This balance contains:  
a Taxable Balance of: \$254,124.83; and  
a Tax Free Balance of: \$411,391.40.  
Tax Free proportion: 61.82%.

I have reached my preservation age and have currently satisfied the condition of release of attaining age 65 under the SIS Act.

I agree to withdraw at least my minimum pension of at least \$16,640.00 and will not exceed my maximum allowable threshold for the current period.

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

Yours sincerely

  
.....  
Judith Brooks  
39/11 Grant Avenue, Hope Island, Queensland 4212

# Minutes of a Meeting of the Trustee(s)

held on 07 March 2022 at 39/11 Grant Avenue, Hope Island, Queensland 4212



**PRESENT:** Judith Brooks and Rebecca Blayney

**PENSION COMMENCEMENT:** Judith Brooks wishes to commence a new Account Based Pension with a commencement date of 01/07/2020.

The Pension Account Balance used to support this pension will be \$665,516.23, consisting of:

- Taxable amount of \$254,124.83; and
- Tax Free amount of \$411,391.40
- Tax Free proportion: 61.82%.

**CONDITION OF RELEASE:** It was resolved that the member has satisfied the condition of release of attaining age 65 and was entitled to access their benefits on their Account Based Pension.

**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

**REVERSIONARY:** The pension does not have a reversionary beneficiary.

**PAYMENT:** It was resolved that the trustees have agreed to pay the pension payment for the current year of at least \$16,640.00 in the frequency of at least an annual payment.

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

X  
  
.....  
Judith Brooks  
Chairperson

07 March 2022

Brooks Family Superannuation Fund  
Judith Brooks  
39/11 Grant Avenue, Hope Island, Queensland 4212

Dear Sir/Madam

**Brooks Family Superannuation Fund  
Commencement of Account Based Pension**

Judith Brooks and Rebecca Blayney as trustee for Brooks Family Superannuation Fund acknowledges that Judith Brooks has advised their intention to commence a new Account Based Pension on 01/07/2020. The pension does not have a reversionary beneficiary.

The Trustee(s) has agreed to this and has taken action to ensure the following:

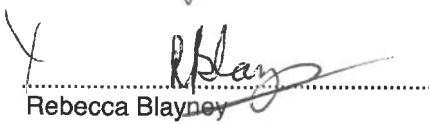
- The member's minimum pension payments are to be made at least annually
  - An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
  - The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
  - The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
  - You have reached your preservation age and satisfied the condition of release of attaining age 65 under the SIS Act.
- Establish that the fund's trust deed provides for payment of this pension to the member.

The trustee(s) have agreed to pay your pension payment for the current year of at least \$16,640.00. The frequency will be at the trustee's discretion however will be at minimum an annual payment.

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

Yours sincerely

  
.....  
Judith Brooks

  
.....  
Rebecca Blayney