

Jennifer Skilton  
D & J SKILTON SUPER FUND  
6 Barcrest Drive, Victoria Point, Queensland 4165

Dear Sir/Madam

**D & J SKILTON SUPER FUND**  
**Continuation of Account Based Pension**

We have recently completed a review of the assets of **D & J SKILTON SUPER FUND** and your Account Based Pension account in the Fund as at 01 July 2019. 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 2020.

Your balance contains:

- a Taxable Balance of: \$64,581.09; and
- a Tax Free Balance of: \$291,433.63

Tax Free proportion: 81.86%.

Your Minimum income stream applicable is \$8,900.00.

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

Yours sincerely

.....  
Jennifer Skilton  
6 Barcrest Drive, Victoria Point, Queensland 4165

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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 2020.

Your balance contains:

- a Taxable Balance of: \$0.00; and
- a Tax Free Balance of: \$274,899.37

Tax Free proportion: 100.00%.

Your Minimum income stream applicable is \$6,870.00.

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

Yours sincerely

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**Continuation of Account Based Pension**

We have recently completed a review of the assets of **D & J SKILTON SUPER FUND** and your Account Based Pension account in the Fund as at 01 July 2019. 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 2020.

Your balance contains:

- a Taxable Balance of: \$503,393.71; and
- a Tax Free Balance of: \$553,619.91

Tax Free proportion: 52.38%.

Your Minimum income stream applicable is \$26,430.00.

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

Yours sincerely

.....  
Jennifer Skilton  
6 Barcrest Drive, Victoria Point, Queensland 4165



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

held on \_\_\_\_\_ at 6 Barcrest Drive, Victoria Point, Queensland 4165

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**PRESENT:** Jennifer Skilton

**PENSION CONTINUATION:** Jennifer Skilton wishes to continue existing Account Based Pension with a commencement date of 01/07/2012. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2019 \$356,014.72, consisting of:

- Taxable amount of \$64,581.09; and
- Tax Free amount of \$291,433.63
- Tax Free proportion: 81.86%.

**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 \$8,900.00 in the frequency of at least an annual payment.

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

.....  
Jennifer Skilton  
Chairperson

**D & J SKILTON SUPER FUND**

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

held on \_\_\_\_\_ at 6 Barcrest Drive, Victoria Point, Queensland 4165

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**PRESENT:** Jennifer Skilton

**PENSION CONTINUATION:** Jennifer Skilton wishes to continue existing Account Based Pension with a commencement date of 01/07/2017. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2019 \$274,899.37, consisting of:

- Taxable amount of \$0.00; and
- Tax Free amount of \$274,899.37
- Tax Free proportion: 100.00%.

**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 \$6,870.00 in the frequency of at least an annual payment.

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

.....  
JenniferSkilton  
Chairperson

**D & J SKILTON SUPER FUND**

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

held on \_\_\_\_\_ at 6 Barcrest Drive, Victoria Point, Queensland 4165

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**PRESENT:** Jennifer Skilton

**PENSION CONTINUATION:** Jennifer Skilton wishes to continue existing Account Based Pension with a commencement date of 01/07/2017. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2019 \$1,057,013.62, consisting of:

- Taxable amount of \$503,393.71; and
- Tax Free amount of \$553,619.91
- Tax Free proportion: 52.38%.

**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 \$26,430.00 in the frequency of at least an annual payment.

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

.....  
JenniferSkilton  
Chairperson

