

30 June 2023

Daniel Paul Smyth  
Smyth Family Prosperity Fund  
5 Greenlinks Crescent, Narangba, Queensland 4504

Dear Sir/Madam

**Smyth Family Prosperity Fund  
Continuation of Transition to Retirement Pension**

We have recently completed a review of the assets of **Smyth Family Prosperity Fund** and your Transition to Retirement Pension account in the Fund as at 01 July 2022. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Transition to Retirement Pension, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2023.

Your balance contains:

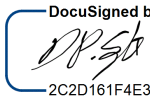
- a Taxable Balance of: \$266,996.63;
- a Tax Free Balance of: \$17,043.92; and
- a Tax Free proportion: 6.00%.

Your Minimum income stream applicable is \$5,680.00.

Your Maximum income stream applicable is \$28,404.06.

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

Yours sincerely

DocuSigned by:  
  
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Daniel Paul Smyth

Smyth Family Prosperity Fund

# Minutes of a Meeting of the Director(s)

held on 30 June 2023 at 5 Greenlinks Crescent, Narangba, Queensland 4504



**PRESENT:** Daniel Paul Smyth and Tinki Kelly Smyth

**PENSION CONTINUATION:** Daniel Paul Smyth wishes to continue existing Transition to Retirement Pension with a commencement date of 01/07/2021. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2022 is \$284,040.55, consisting of:

- Taxable amount of: \$266,996.63; and
- Tax Free amount of: \$17,043.92
- Tax Free proportion: 6.00%.

**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 \$5,680.00 in the frequency of at least an annual payment.

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

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Daniel Paul Smyth  
Chairperson