

Lorraine Worthington
WORTHINGTON SUPERANNUATION FUND
16 Nadine Crescent, Thornlands, Queensland 4164

Dear Sir/Madam

WORTHINGTON SUPERANNUATION FUND
Continuation of Account Based Pension

We have recently completed a review of the assets of **WORTHINGTON SUPERANNUATION FUND** and your Account Based Pension account in the Fund as at 01 July 2021. 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 2022.

Your balance contains:

- a Taxable Balance of: \$82,359.66; and
- a Tax Free Balance of: \$1,100.59

Tax Free proportion: 1.32%.

Your Minimum income stream applicable is \$2,090.00.

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

Yours sincerely

.....
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16 Nadine Crescent, Thornlands, Queensland 4164

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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 2022.

Your balance contains:

- a Taxable Balance of: \$9,303.68; and
- a Tax Free Balance of: \$0.00

Tax Free proportion: 0.00%.

Your Minimum income stream applicable is \$230.00.

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 **WORTHINGTON SUPERANNUATION FUND** and your Account Based Pension account in the Fund as at 01 July 2021. 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 2022.

Your balance contains:

- a Taxable Balance of: \$6,423.61; and
- a Tax Free Balance of: \$98,108.17

Tax Free proportion: 93.85%.

Your Minimum income stream applicable is \$2,610.00.

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

Yours sincerely

.....
Lorraine Worthington
16 Nadine Crescent, Thornlands, Queensland 4164

WORTHINGTON SUPERANNUATION FUND

Minutes of a Meeting of the Director(s)

held on _____ at 16 Nadine Crescent, THORNLANDS, Queensland 4164

PRESENT: Lorraine Worthington and Michael Shaun Worthington

PENSION CONTINUATION: Lorraine Worthington wishes to continue existing Account Based Pension with a commencement date of 11/11/2020. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2021 \$83,460.25, consisting of:

- Taxable amount of \$82,359.66; and
- Tax Free amount of \$1,100.59
- Tax Free proportion: 1.32%.

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 \$2,090.00 in the frequency of at least an annual payment.

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

.....
LorraineWorthington
Chairperson

WORTHINGTON SUPERANNUATION FUND

Minutes of a Meeting of the Director(s)

held on _____ at 16 Nadine Crescent, THORNLANDS, Queensland 4164

PRESENT:

Lorraine Worthington and Michael Shaun Worthington

PENSION CONTINUATION:

Lorraine Worthington wishes to continue existing Account Based Pension with a commencement date of 30/06/2021. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2021 \$9,303.68, consisting of:

- Taxable amount of \$9,303.68; and
- Tax Free amount of \$0.00
- Tax Free proportion: 0.00%.

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 \$230.00 in the frequency of at least an annual payment.

CLOSURE:

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

.....
LorraineWorthington
Chairperson

WORTHINGTON SUPERANNUATION FUND

Minutes of a Meeting of the Director(s)

held on _____ at 16 Nadine Crescent, THORNLANDS, Queensland 4164

PRESENT:

Lorraine Worthington and Michael Shaun Worthington

PENSION CONTINUATION:

Lorraine Worthington wishes to continue existing Account Based Pension with a commencement date of 10/03/2021. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2021 \$104,531.78, consisting of:

- Taxable amount of \$6,423.61; and
- Tax Free amount of \$98,108.17
- Tax Free proportion: 93.85%.

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 \$2,610.00 in the frequency of at least an annual payment.

CLOSURE:

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

.....
Lorraine Worthington
Chairperson

