

01 June 2018

Sean Moriarty
Moriarty Family Superannuation Fund
21 Stokes Street, Bardon, Queensland 4065

Dear Sir/Madam

**Moriarty Family Superannuation Fund
Continuation of Transition to Retirement Pension**

We have recently completed a review of the assets of **Moriarty Family Superannuation Fund** and your Transition to Retirement Pension account in the Fund as at 01 July 2017. It is confirmed that the pension balance will automatically revert to Cassandra Moriarty upon the death of the member.

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 2018.

Your balance contains:

- a Taxable Balance of: \$42,364.13; and
- a Tax Free Balance of: \$291,935.15

Tax Free proportion: 87.33%.

Your Minimum income stream applicable is \$13,370.00.

Your Maximum income stream applicable is \$33,429.93.

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

Yours sincerely

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Sean Moriarty
21 Stokes Street, Bardon, Queensland 4065

Moriarty Family Superannuation Fund
Pension Summary Report

As at 30/06/2018

Member Name : Moriarty, Sean

Member Age : 57 (Date of Birth : 08/06/1960)

Member Code	Pension Type	Pension Start Date	Tax Free	Min / PF	Minimum	Maximum	Gross Pension Payments	PAYG	Net Pension Payment	Amount to reach Minimum
MORSEA 00003P	Transition to Retirement Pension	26/07/2016	87.33%	4.00%	\$13,370.00	\$33,429.93	\$16,966.45	\$0.00	\$16,966.45	NIL
					\$13,370.00	\$33,429.93	\$16,966.45	\$0.00	\$16,966.45	\$0.00
Total :										
					\$13,370.00	\$33,429.93	\$16,966.45	\$0.00	\$16,966.45	\$0.00

Minutes of a Meeting of the Director(s)

held on 15 September 2018 at 21 Stokes Street, Bardon, Queensland 4065

PRESENT: Cassandra Moriarty and Sean Moriarty

PENSION CONTINUATION: Sean Moriarty wishes to continue existing Transition to Retirement Pension with a commencement date of 26/07/2016. It is confirmed that the pension balance will automatically revert to Cassandra Moriarty upon the death of the member.

The Pension Account Balance as at 01/07/2017 \$334,299.28, consisting of:

- Taxable amount of: \$42,364.13; and
- Tax Free amount of: \$291,935.15
- Tax Free proportion: 87.33%.

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 their beneficiary(s).
- 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 \$13,370.00 in the frequency of at least an annual payment.

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

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Cassandra Moriarty
Chairperson

