

01 July 2021

Andrew Douglas Mudge
1606/10 Fifth Avenue
Palm Beach, Queensland 4221

Dear Sir/Madam

**Mudge Superannuation Fund
Commencement of Transition to Retirement Pension**

I hereby request the trustee to commence a Transition to Retirement Pension with a commencement date of 01/07/2021 with \$170,957.65 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: \$80,286.00; and
a Tax Free Balance of: \$90,671.65.
Tax Free proportion: 53.04%.

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

I agree to withdraw at least my minimum pension of at least \$3,420.00 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

X

.....
Julie-Ann Marguerite Mudge
1606/10 Fifth Avenue, Palm Beach, Queensland 4221

Minutes of a Meeting of the Director(s)

held on 01 July 2021 at 1606/10 Fifth Avenue, Palm Beach, Queensland 4221



PRESENT:

Andrew Douglas Mudge and Julie-Ann Marguerite Mudge

PENSION COMMENCEMENT:

Julie-Ann Marguerite Mudge wishes to commence a new Transition to Retirement Pension with a commencement date of 01/07/2021.

The Pension Account Balance used to support this pension will be \$170,957.65, consisting of:

- Taxable amount of \$80,286.00; and
- Tax Free amount of \$90,671.65
- Tax Free proportion: 53.04%.

CONDITION OF RELEASE:

It was resolved that the member has satisfied the condition of release of attaining preservation age and was entitled to access their benefits on their Transition to Retirement 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 \$3,420.00 in the frequency of at least an annual payment.

CLOSURE:

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

A handwritten signature in black ink, appearing to read 'A Mudge', with a large 'X' written to the left of the signature.

Andrew Douglas Mudge
Chairperson