

19 May 2021

THE TRUSTEES
GREENWOOD SUPERANNUATION FUND
3863 MT LINDSAY HIGHWAY
PARK RIDGE QLD 4125

Dear Sir/Madam,

**RE: PAYMENT OF MY DEATH BENEFIT ENTITLEMENT IN THE GREENWOOD
SUPERANNUATION FUND**

I, Fraser Greenwood, am currently a member of the Greenwood Superannuation Fund and the designated beneficiary of Lorna Greenwood, a former member of the Greenwood Superannuation Fund. With the passing of Lorna Greenwood, I request that the trustee pay my death benefit entitlement from the Fund as an account-based pension.

My relevant details are as follows:-

Full Name:	Fraser Greenwood
Address:	3863 Mt Lindsay Highway, Park Ridge QLD 4125
Date of Birth:	18 March 1930
Amount of my Death Benefit Entitlement to be used to fund the Pension:	\$174,378.84

Please do all necessary things to commence payment of my pension on or as soon as possible after the 19 May 2021.

I am aware that amounts which the Trustee(s) deem are applicable to the establishment and maintenance of this pension is chargeable against my Member's account.

Yours Sincerely,

Fraser Greenwood

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Fraser Greenwood

**MINUTES OF A MEETING OF
FRASER GREENWOOD
AS TRUSTEE FOR:-
GREENWOOD SUPERANNUATION FUND
HELD AT: 3863 MT LINDSAY HIGHWAY QLD 4125**

ON: 19 MAY 2021

PRESENT: Fraser Greenwood (Chairman)

**ACCOUNT-BASED
PENSION
REQUEST:**

The Chairman tabled a letter from Fraser Greenwood, a Member of the Greenwood Superannuation Fund, who is the designated beneficiary of Lorna Greenwood for the payment of their super benefits, in the event of their death. The Chairman noted that that letter contained a request that the benefit to which Fraser Greenwood is entitled be paid as an account-based pension. The Trustee, being satisfied that such a discretion exists pursuant to the Fund's deed, resolved that an account-based pension be paid to Fraser Greenwood.

The Chairman also tabled the most recent fund records available, confirming that:-

- (a) The beneficiary is of an age when benefits may commence to be paid to the beneficiary;
- (b) The beneficiary is the designated beneficiary of Lorna Greenwood;
- (c) The Trustee is not aware of any present or prospective challenge to Fraser Greenwood's status as designated beneficiary of Lorna Greenwood;
- (d) The Member has sufficient benefits in the Member's Accumulation Account which have met a Condition of Release (pursuant to the Superannuation Industry Supervision Regulations) to meet the requested amount;
- (e) The Member has sufficient benefits which have a nil cashing restriction, or the payment of an account-based pension is within the relevant cashing restriction (pursuant to the Superannuation Industry Supervision Regulations) to meet the requested amount;
- (f) The Fund's Governing Rules allows the payment of death benefits as account-based pensions to spouses and dependants of deceased members.

RESOLVED: That the Trustee approve payment of an account-based pension to Fraser Greenwood, representing 100% from Lorna Greenwood's Accumulation Amount and that the Trustee take the following steps to execute this resolution:-

- 1. Calculate the minimum annual amount payable as an account-based pension for the current year to Fraser Greenwood pursuant to Regulation 1.06(9A)(a) of the SIS Regulations.
- 2. Write to the Member outlining the terms on which an account-based pension may be paid under the SIS Act and Regulations.

3. Register as a PAYG withholder with the Australian Taxation Office if required.
4. Review the Fund's Investment Strategy, in view of the fact that it now has a regular cash outflow requirement to be funded.

CLOSURE: There being no further business, the meeting was declared closed.

Signed as a Correct Record

Fraser Greenwood

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Fraser Greenwood

19 May 2021

THE TRUSTEES
GREENWOOD SUPERANNUATION FUND
3863 MT LINDSAY HIGHWAY
PARK RIDGE QLD 4125

FRASER GREENWOOD
GREENWOOD SUPERANNUATION FUND
3863 MT LINDSAY HIGHWAY
PARK RIDGE QLD 4125

Dear Member,

**RE: PAYMENT OF YOUR DEATH BENEFIT ENTITLEMENT IN THE GREENWOOD
SUPERANNUATION FUND**

The Trustees have met and have approved payment of an account-based pension as the means of payment of the benefits to which you are entitled as Lorna Greenwood's nominated beneficiary.

Your pension is subject to certain minimum standards, as set down in Regulation 1.06(9A)(a) of the Superannuation Industry Supervision Regulations. A copy of these conditions is attached.

As part of these requirements, there is a minimum amount which must be paid to you each financial year. For the present financial year, a minimum amount of \$1,130 of your death benefit account balance must be paid.

The Trustees are obliged to withhold income tax in relation to certain pension payments made before age 60. Your pension may therefore be net of any taxes required to be withheld, from time to time. Where tax has been withheld, you will receive a PAYG Payment Summary at the end of each financial year outlining this amount, for inclusion with your personal income tax return for that year. The trustee is not required to withhold any PAYG tax form benefits paid to a member who is 60 years of age or over for the entire tax year and PAYG Payment Summaries are not required.

Please be aware there are certain costs attached to calculating and paying your account-based pension, including professional fees and other costs.

Yours Sincerely,

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Fraser Greenwood

Document electronically signed



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Document Details

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Signed by	Fraser Greenwood (fdgco@bigpond.com)
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Document Signers

Signer 1

Name	Fraser Greenwood
Email	fdgco@bigpond.com
Mobile	N/A
IP Address/es	211.30.37.237
Signed on Pages	1, 3
Verification Mode	Email Code



DOCUMENT AUDIT LOG

DATE TIME	USER	TRANSACTION
2022-06-23 15:44 +10:00	LOUISEH@HWONE.COM.AU	DOCUMENT BUNDLE CREATED BY LOUISE HUNT (LOUISEH@HWONE.COM.AU)
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2022-06-23 16:38 +10:00	FRASER GREENWOOD	LINK OPENED FROM IP 211.30.37.237
2022-06-23 16:39 +10:00	FRASER GREENWOOD	DOCUMENT SIGNED: PENSION COMMENCEMENT - FRASER GREENWOOD - ON PAGE 1 (SIGNATUREID: 06AE7FF7-0012-445C-927D-803841FA53DC)
2022-06-23 16:39 +10:00	FRASER GREENWOOD	DOCUMENT SIGNED: PENSION COMMENCEMENT - FRASER GREENWOOD - ON PAGE 3 (SIGNATUREID: 8FDC2B97-4EFA-43BA-A7C4-DEB8615C558C)
2022-06-23 16:39 +10:00	FRASER GREENWOOD	DOCUMENT SIGNED: PENSION COMMENCEMENT - FRASER GREENWOOD
2022-06-23 16:39 +10:00	SYSTEM	FINALISING DOCUMENT (9F065CAE-2221-4E13-9191-038E6CCD3989)

More Information

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