

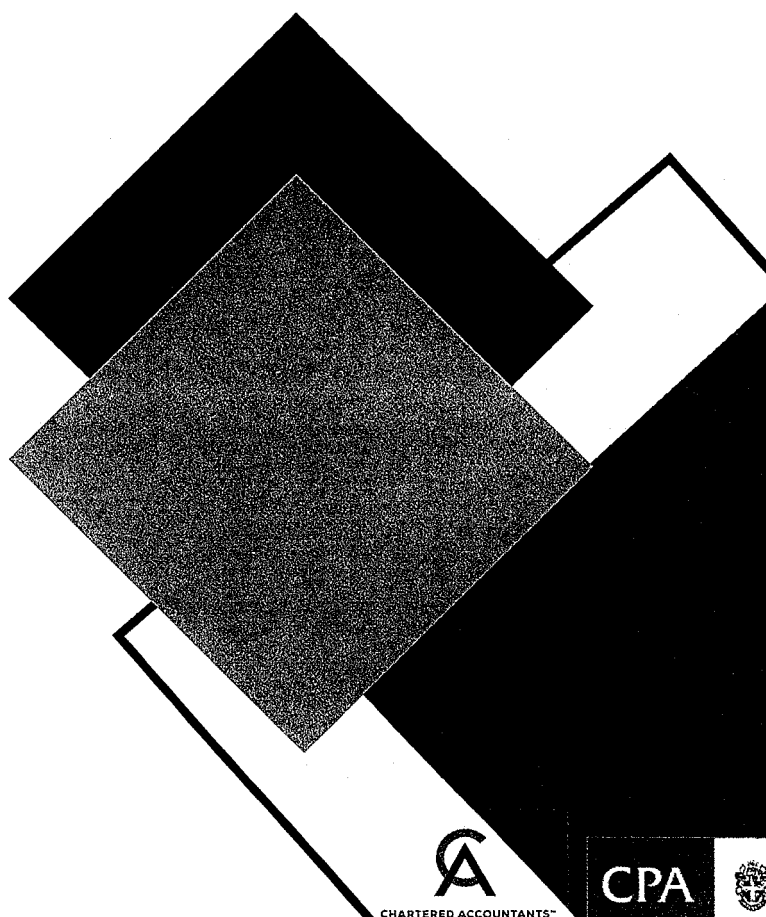
Blue Chip Super

ABN: 23108645110 | AFSL:453296

SMSF PENSION PACK

Hore and Sloan Family Superannuation Fund

Charles Hore



CHARTERED ACCOUNTANTS™

CPA



14 October 2022

Hore and Sloan Family Superannuation Fund
Charles Hore
44 Anchorage Parade
Shellcove NSW 2529

Dear Sir/Madam

HORE AND SLOAN FAMILY SUPERANNUATION FUND
Commencement of Account Based Pension

I hereby request the trustee to commence a Account Based Pension with a commencement date of 14/10/2022 with \$541,081.35 of the superannuation benefits standing to my member's account in the fund. It is confirmed that the pension balance will automatically revert to Denise Sloan upon the death of the member.

This balance contains:

a Taxable Balance of: \$87,257.00; and

a Tax Free Balance of: \$453,824.35.

Tax Free proportion: 83.87%.

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

I agree to withdraw pension of \$12,500.00 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



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Charles Hore
44 Anchorage Parade
Shellcove NSW 2529

14 October 2022

Hore and Sloan Family Superannuation Fund
Charles Hore
44 Anchorage Parade
Shellcove NSW2529

Dear Sir/Madam

HORE AND SLOAN FAMILY SUPERANNUATION FUND
Commencement of Account Based Pension

Charles Hore and Denise Sloan as trustee for Hore and Sloan Family Superannuation Fund acknowledges that Charles Hore has advised their intention to commence a new Account Based Pension on 14/10/2022. It is confirmed that the pension balance will automatically revert to Denise Sloan upon the death of the member.

The Trustee(s) has 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
- You have reached your preservation age and satisfied a condition of release under the SIS Act.
- Establish that the fund's trust deed provides for payment of this pension to the member.

The trustee(s) have agreed to pay your pension payment for the current year of \$12,500.00 in the frequency of at least an annual payment.

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

Yours sincerely



Charles Hore



Denise Sloan

Minutes of a Meeting of the Trustee(s)

held on 14 October 2022 at 44 Anchorage Parade, Shellcove, New South Wales 2529

PRESENT:

Charles Hore and Denise Sloan

PENSION COMMENCEMENT:

Charles Hore wishes to commence a new Account Based Pension with a commencement date of 14/10/2022.

The Pension Account Balance used to support this pension will be \$541,081.35, consisting of:

- Taxable amount of \$87,257.00; and
- Tax Free amount of \$453,824.35

Tax Free proportion: 83.87%.

CONDITION OF RELEASE:

It was resolved that the member has satisfied a Condition of Release and was entitled to access their benefits on their Account Based 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:

It is confirmed that the pension balance will automatically revert to Denise Sloan upon the death of the member.

PAYMENT:

It was resolved that the trustees have agreed to pay the pension payment for the current year of \$12,500.00 in the frequency of at least an annual payment.

CLOSURE:

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



Charles Hore
Chairperson