

Brooker Family Superannuation Fund
Ann Brooker
14 Waymouth Avenue, Glandore, South Australia 5037

Dear Sir/Madam

**Brooker Family Superannuation Fund
Commencement of Account Based Pension**

I hereby request the trustee(s) to commence a Account Based Pension with a commencement date of 01/07/2022 with \$102,499.22 of the superannuation benefits standing to my member's account in the fund.

This balance contains a Taxable Balance of : \$2,499.23
and a Tax Free Balance of : \$99,999.99

I have reached my preservation age and have currently satisfied a condition of release under the SIS Act. The pension is to be reversionary to my spouse, Paul Brooker.

I wish to take my minimum pension of \$2,050.00 for the current period, with payments to be made on a yearly basis.

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

Yours sincerely



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Ann Brooker
14 Waymouth Avenue, Glandore, South Australia 5037

MINUTES OF A MEETING OF THE Trustee(s) HELD AT 14 Waymouth Avenue, Glandore, South Australia 5037

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- PRESENT:** Paul Brooker and Ann Brooker
- PENSION COMMENCEMENT:** Ann Brooker wishes to commence a new Account Based Pension pension with a commencement date of 01/07/2022
The Pension Account Balance used to support this pension will be \$102,499.22,
Consisting of:
- a Taxable amount of \$2,499.23
- and a Tax Free amount of \$99,999.99
- CONDITION OF RELEASE:** It was resolved that the member has satisfied a Condition of Release and was entitled to access their benefits as an 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 was resolved that the pension will be reversionary to Paul Brooker.
- PAYMENT:** It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$2,050.00 in the frequency of at least an annual payment.
- CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.



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Paul Brooker
Chairperson

Brooker Family Superannuation Fund
Ann Brooker
14 Waymouth Avenue, Glandore, South Australia 5037

Dear Sir/Madam

**Brooker Family Superannuation Fund
Commencement of Account Based Pension**

Paul Brooker and Ann Brooker as trustee for Brooker Family Superannuation Fund acknowledges that Ann Brooker has advised their intention to commence a new Account Based Pension on 01/07/2022. It is confirmed that the pension balance will automatically revert to Paul Brooker 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 their beneficiary(s).
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- You have reached your preservation age and satisfied the condition of release of retirement 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 at least \$2,050.00. The frequency will be at the trustee's discretion however will be at minimum an annual payment.

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

Yours sincerely



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Paul Brooker



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Ann Brooker