

Woodroffe Superannuation Fund
Pension Summary

As at 30 June 2019

Member Name : Woodroffe, Kerry Dominic
 Member Age : 64* (Date of Birth : 05/12/1954)

Member Code	Pension Type	Pension Start Date	Tax Free	Min / PF	Minimum	Maximum	Gross Pension Payments	PAYG	Net Pension Payment	Amount to reach Minimum
WOOKER 00001P	Account Based Pension	01/07/2012	99.65%	4.00%	\$0.00	N/A	\$62.03	\$0.00	\$62.03	NIL
WOOKER 00003P	Account Based Pension	01/07/2017	87.72%	4.00%	\$0.00	N/A	\$102.55	\$0.00	\$102.55	NIL
WOOKER 00005P	Account Based Pension	30/06/2018	100.00 %	4.00%	\$0.00	N/A	\$0.00	\$0.00	\$0.00	NIL
WOOKER 00006P	Account Based Pension	30/06/2019	99.99%	0.00%	\$0.00	N/A	\$375.98	\$0.00	\$375.98	NIL
Total :										
					\$0.00	\$0.00	\$540.56	\$0.00	\$540.56	\$0.00
					\$0.00	\$0.00	\$540.56	\$0.00	\$540.56	\$0.00

*Age as at 01/07/2018 or pension start date for new pensions.

/ /
Kerry Dominic Woodroofe
Woodroofe Superannuation Fund
42 Ferrier Street, Aspley, Queensland 4034

Dear Sir/Madam

**Woodroofe Superannuation Fund
Continuation of Account Based Pension**

We have recently completed a review of the assets of **Woodroofe Superannuation Fund** and your Account Based Pension account in the Fund as at 01 July 2018. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Account Based Pension, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2019.

Your balance contains:

- a Taxable Balance of: \$38,984.00;
- a Tax Free Balance of: \$(38,921.97); and
- a Tax Free proportion: 99.65%.

Your Minimum income stream applicable is \$0.00.

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

Yours sincerely



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Kerry Dominic Woodroofe

Minutes of a Meeting of the Trustee(s)

held on 02 March 2021 at 42 Ferrier Street, Aspley, Queensland 4034

PRESENT: Kerry Dominic Woodroofe and Kwee Foong Hew

PENSION CONTINUATION: Kerry Dominic Woodroofe wishes to continue existing Account Based Pension with a commencement date of 01/07/2012. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2018 is \$62.03, consisting of:

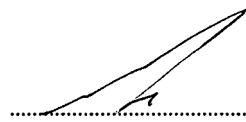
- Taxable amount of: \$38,984.00; and
- Tax Free amount of: \$(38,921.97)
- Tax Free proportion: 99.65%.

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

PAYMENT: It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$0.00 in the frequency of at least an annual payment.

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


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Kerry Dominic Woodroofe
Chairperson

/ /
Kerry Dominic Woodroofe
Woodroofe Superannuation Fund
42 Ferrier Street, Aspley, Queensland 4034

Dear Sir/Madam

**Woodroofe Superannuation Fund
Continuation of Account Based Pension**

We have recently completed a review of the assets of **Woodroofe Superannuation Fund** and your Account Based Pension account in the Fund as at 01 July 2018. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Account Based Pension, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2019.


Your balance contains:

- a Taxable Balance of: \$13.80;
- a Tax Free Balance of: \$88.75; and
- a Tax Free proportion: 87.72%.

Your Minimum income stream applicable is \$0.00.

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

Yours sincerely


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Kerry Dominic Woodroofe

Minutes of a Meeting of the Trustee(s)

held on 02 March 2021 at 42 Ferrier Street, Aspley, Queensland 4034

PRESENT: Kerry Dominic Woodroofe and Kwee Foong Hew

PENSION CONTINUATION: Kerry Dominic Woodroofe wishes to continue existing Account Based Pension with a commencement date of 01/07/2017. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2018 is \$102.55, consisting of:

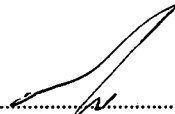
- Taxable amount of: \$13.80; and
- Tax Free amount of: \$88.75
- Tax Free proportion: 87.72%.

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

PAYMENT: It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$0.00 in the frequency of at least an annual payment.

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


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Kerry Dominic Woodroofe
Chairperson

/ /
Woodroofe Superannuation Fund
Kerry Dominic Woodroofe
42 Ferrier Street, Aspley, Queensland 4034

Dear Sir/Madam

**Woodroofe Superannuation Fund
Commencement of Account Based Pension**

Kerry Dominic Woodroofe and Kwee Foong Hew as trustee for Woodroofe Superannuation Fund acknowledges that Kerry Dominic Woodroofe has advised their intention to commence a new Account Based Pension on 30/06/2019. The pension does not have a reversionary beneficiary.


The Trustee(s) has agreed to this and has taken action to ensure the following:

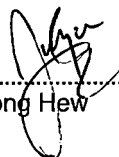
- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to 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 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 . 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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Kerry Dominic Woodroofe


.....
Kwee Foong Hew

/ /
Kerry Dominic Woodroofe
42 Ferrier Street
Aspley, Queensland 4034

Dear Sir/Madam

**Woodroofe Superannuation Fund
Commencement of Account Based Pension**

I hereby request the trustee to commence a Account Based Pension with a commencement date of 30/06/2019 with \$5,224.36 of the superannuation benefits standing to my member's account in the fund. The pension does not have a reversionary beneficiary.

This balance contains:

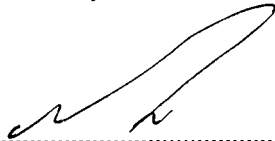
a Taxable Balance of: \$0.36; and
a Tax Free Balance of: \$5,224.00.
Tax Free proportion: 99.99%.

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

I agree to withdraw at least my minimum pension of at least 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

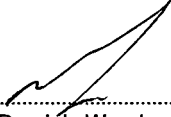


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Kerry Dominic Woodroofe
42 Ferrier Street, Aspley, Queensland 4034

Minutes of a Meeting of the Trustee(s)

held on 02 March 2021 at 42 Ferrier Street, Aspley, Queensland 4034

- PRESENT:** Kerry Dominic Woodroofe and Kwee Foong Hew
- PENSION COMMENCEMENT:** Kerry Dominic Woodroofe wishes to commence a new Account Based Pension with a commencement date of 30/06/2019.
- The Pension Account Balance used to support this pension will be \$5,224.36, consisting of:
- Taxable amount of \$0.36; and
 - Tax Free amount of \$5,224.00
 - Tax Free proportion: 99.99%.
- CONDITION OF RELEASE:** It was resolved that the member has satisfied the condition of release of retirement 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:** 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 in the frequency of at least an annual payment.
- CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.


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Kerry Dominic Woodroofe
Chairperson