

07 June 2023

Lucy Kathleen Hurley
THE HURLEY SUPERANNUATION FUND
75 Horace Street, Mount Helena, Western Australia 6082

Dear Sir/Madam

THE HURLEY SUPERANNUATION FUND
Continuation of Transition to Retirement Pension

We have recently completed a review of the assets of **THE HURLEY SUPERANNUATION FUND** and your Transition to Retirement Pension account in the Fund as at 01 July 2021. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Transition to Retirement Pension, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2022.

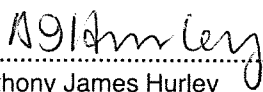
Your balance contains:

- a Taxable Balance of: \$24,759.48;
- a Tax Free Balance of: \$219,290.06; and
- a Tax Free proportion: 5.54%.

Your Minimum income stream applicable is \$4,880.00.
Your Maximum income stream applicable is \$24,404.95.

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

Yours sincerely

(A) 
.....
Anthony James Hurley

THE HURLEY SUPERANNUATION FUND

Minutes of a Meeting of the Trustee(s)

held on 07 June 2023 at 75 Horace Street, Mount Helena, Western Australia 6082

PRESENT:

Anthony James Hurley and Lucy Kathleen Hurley

PENSION CONTINUATION:

Lucy Kathleen Hurley wishes to continue existing Transition to Retirement Pension with a commencement date of 01/07/2014. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2021 is \$244,049.54, consisting of:

- Taxable amount of: \$24,759.48; and
- Tax Free amount of: \$219,290.06
- Tax Free proportion: 5.54%.

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

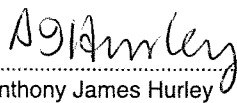
PAYMENT:

It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$4,880.00 in the frequency of at least an annual payment.

CLOSURE:

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

XAJ



Anthony James Hurley
Chairperson

PAYG Payment Summary - Superannuation Income Stream
Payment summary for year ending 30 June 2022

Warning: This form has been designed to assist you to prepare the Australian Tax Office's PAYG Payment Summary Statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

Payee Details

Payee's surname or family name

HURLEY

Payee's given name(s)

LUCY KATHLEEN

Payee's address

75 HORACE STREET

MOUNT HELENA

WA 6082

Date of birth

Provided

NOTICE TO PAYEE If this payment summary shows an amount in the total tax withheld box, you must lodge a tax return. If no tax was withheld, you may still have to lodge a tax return. If you have already lodged your tax return, you may need to lodge an amendment request. For more information about this payment summary, lodging your tax return or an amendment request, you can: - visit www.ato.gov.au - refer to TaxPack - phone 132861

Period of payment 01/07/2021 to 30/06/2022

Payee's Tax File Number

Provided

Total Tax Withheld \$

Taxable component

Taxed element

\$ 4,628

Untaxed element

\$

Tax free component

\$ 271

Tax offset amount

\$

Lump sum in arrears - taxable component

\$

Lump sum in arrears - tax free component

\$

Payer Details

Payer's ABN or Withholder Payer Number

11293653964

Branch Number

Payer's Name

THE HURLEY SUPERANNUATION FUND

Signature of authorised person

AG Hurley

Date

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