

COBA Super Fund
Margaret Hanley
55/299 Burns Bay Road, Lane Cove, New South Wales 2066

Dear Sir/Madam

**COBA Super Fund
Commencement of Account Based Pension**

I hereby request the trustee(s) to commence a Account Based Pension with a commencement date of 21/11/2021 with \$1,545,394.69 of the superannuation benefits standing to my member's account in the fund.

This balance contains a Taxable Balance of : \$694,569.62
and a Tax Free Balance of : \$850,825.07

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

I wish to take my minimum pension of \$28,200.00 for the current period, with payments to be made on at least a yearly basis.

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

Yours sincerely

.....
Margaret Hanley
55/299 Burns Bay Road, Lane Cove, New South Wales 2066

mmh w/h-t

MINUTES OF A MEETING OF THE Director(s) HELD AT, New South Wales 2113

-
- PRESENT:** Margaret Hanley and William Hanley
- PENSION COMMENCEMENT:** Margaret Hanley wishes to commence a new Account Based Pension pension with a commencement date of 21/11/2021
The Pension Account Balance used to support this pension will be \$1,545,394.69, Consisting of:
- a Taxable amount of \$694,569.62
- and a Tax Free amount of \$850,825.07
- 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 not be reversionary.
- PAYMENT:** It was resolved that the trustees have agreed to pay at least the pension payment for the current year of \$28,200.00 in the frequency of at least an annual payment.
- CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.

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Margaret Hanley
Chairperson

mmh w/h

COBA Super Fund
Margaret Hanley
55/299 Burns Bay Road, Lane Cove, New South Wales 2066

Dear Sir/Madam

**COBA Super Fund
Commencement of Account Based Pension**

Margaret Hanley and William Hanley as trustee for COBA Super Fund acknowledges that Margaret Hanley has advised their intention to commence a new Account Based Pension on 21/11/2021. 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 attaining age 65 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 \$28,200.00. 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

.....
Margaret Hanley

.....
William Hanley

mmh w/h

Document electronically signed



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Document Details

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FuseSign subscriber	Green Frog Super
Initiator email	support@greenfrogsuper.com.au
Signed by	Margaret Hanley (marghanley@hotmail.com +61 xxxxxxx 326), William Hanley (whanley@optusnet.com.au +61 xxxxxxx 137)
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Document Signers

Signer 1

Name Margaret Hanley
Email marghanley@hotmail.com
Mobile +61 xxxxxxx 326
IP Address 58.107.189.102
Verification Mode SMS Code

Signer 2

Name William Hanley
Email whanley@optusnet.com.au
Mobile +61 xxxxxxx 137
IP Address 49.3.119.150
Verification Mode SMS Code

DOCUMENT AUDIT LOG

DATE TIME	USER	TRANSACTION
2022-11-08 12:42 +10:00	SUPPORT@GREENFROGSUPER.COM.AU	DOCUMENT BUNDLE CREATED BY KAREN BARNES (SUPPORT@GREENFROGSUPER.COM.AU) (SOURCE IP ADDRESS: 220.245.114.141)
2022-11-08 12:42 +10:00	SYSTEM	EMAILS SENT TO: MARGHANLEY@HOTMAIL.COM (11 DOCUMENTS - 9 ACTIONS) WHANLEY@OPTUSNET.COM.AU (11 DOCUMENTS - 8 ACTIONS) SMSS SENT TO: MARGARET HANLEY - +61 XXXXXXX 326 (11 DOCUMENTS - 9 ACTIONS) WILLIAM HANLEY - +61 XXXXXXX 137 (11 DOCUMENTS - 8 ACTIONS)
2022-11-15 06:03 +10:00	SYSTEM	AUTOMATED REMINDER SENT TO MARGARET HANLEY VIA MARGHANLEY@HOTMAIL.COM (9 ACTIONS)
2022-11-15 06:03 +10:00	SYSTEM	AUTOMATED REMINDER SENT TO MARGARET HANLEY VIA MARGHANLEY@HOTMAIL.COM (9 ACTIONS)
2022-11-15 06:03 +10:00	SYSTEM	AUTOMATED REMINDER SENT TO WILLIAM HANLEY VIA WHANLEY@OPTUSNET.COM.AU (8 ACTIONS)
2022-11-15 06:03 +10:00	SYSTEM	AUTOMATED REMINDER SENT TO WILLIAM HANLEY VIA WHANLEY@OPTUSNET.COM.AU (8 ACTIONS)
2022-11-15 07:45 +10:00	WILLIAM HANLEY	SMS VERIFICATION REQUESTED TO MOBILE ENDING IN 137
2022-11-15 07:45 +10:00	WILLIAM HANLEY	CODE ENTERED AND VERIFIED
2022-11-15 07:45 +10:00	WILLIAM HANLEY	LINK OPENED FROM IP 49.3.119.150
2022-11-15 07:50 +10:00	WILLIAM HANLEY	DOCUMENT SIGNED: 2022 PENSION DOCS - 21.11.21
2022-11-15 07:51 +10:00	WILLIAM HANLEY	LINK OPENED FROM IP 49.3.119.150
2022-11-15 07:54 +10:00	WILLIAM HANLEY	WILLIAM HANLEY HAS COMPLETED BUNDLE 68A17277-15F5-4C40-BD77-23811D6D3787
2022-11-15 10:31 +10:00	MARGARET HANLEY	SMS VERIFICATION REQUESTED TO MOBILE ENDING IN 326
2022-11-15 10:31 +10:00	MARGARET HANLEY	CODE ENTERED AND VERIFIED
2022-11-15 10:31 +10:00	MARGARET HANLEY	LINK OPENED FROM IP 58.107.189.102
2022-11-15 10:32 +10:00	MARGARET HANLEY	DOCUMENT SIGNED: 2022 PENSION DOCS - 21.11.21
2022-11-15 10:32 +10:00	SYSTEM	FINALISING DOCUMENT (D11E6FA3-E634-48CA-984E-ED9840567DF3)

More Information

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