

APPLICATION FOR PARTIAL COMMUTATION (LUMP SUM) OF PENSION

Name of Fund: Brooker Family Superannuation Fund

Member's Name: Paul Brooker

Dear Trustee(s),

I request to commute an amount from my pension and for the commutation amount to be paid as a Lump Sum. I acknowledge that this request has been made before the withdrawal has been taken and that the request is irrevocable.

I also acknowledge that I am aware that this payment will not count towards the minimum pension payment that must be taken for the year.

Details of the Lump Sum

Date of Payment: 04/12/2023

Commutation Amount: \$186,000.00

Pension Account: _____

(if member has more than one pension in the fund please nominate which pension to take the lump sum payment from)

Yours faithfully,

 _____

Member name: Paul Brooker

Minutes of Meeting of Trustees/Directors

Name of Fund: Brooker Family Superannuation Fund

Held at: 14 Weymouth Ave. Glandore SA 5037

Held on: 20/11/2023

Attendees: Paul Brooker
Ann Brooker

Pension Commutation - Partial

The Trustee(s) have received a notification from the member to partially commute an amount from their income stream.

The details are:

Member Name: Paul Brooker

Date of Payment: 04/12/2023

Commutation Amount: \$186,000.00

Pension Account Number: _____

(if member has more than one pension in place)

Trustee Acceptance

The Trustee(s) confirm receipt of the member’s notice and agree to the request. This agreement cannot be subsequently revoked after the date of the agreement.

Trustee Acknowledgment

The Trustee(s) have resolved that the irrevocable documentation is in order, it is consistent with the governing rules of the fund and that the amount be treated as a Lump Sum payment.

Closure

There being no further business the meeting was declared closed.

Signed as a true and correct record by the Chairperson

 _____

Name: Paul Brooker

Date: 20 / 11 / 2023