

**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:** 21/11/2023

**Commutation Amount:** \$280,000.00

**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:** 01/11/2023

**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:** 21/11/2023

**Commutation Amount:** \$280,000.00

**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: 01 / 11 / 2023