

## Minutes of a Meeting of the Trustee(s)

held on 1 July 2019 at 24 LEONARD STREET, TOLGA, Queensland 4882

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**PRESENT:**

Julie Ann Scott and Robert William Scott

**PENSION COMMENCEMENT:**

Robert William Scott wishes to commence a new Account Based Pension with a commencement date of 01/07/2019.

The Pension Account Balance used to support this pension will be \$19,534.00, consisting of:

- Taxable amount of \$15,034.00; and
- Tax Free amount of \$4,500.00
- Tax Free proportion: 23.04%.

**CONDITION OF RELEASE:**

It was resolved that the member has satisfied the condition of release of attaining age 65 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 their beneficiary(s).
- 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 is confirmed that the pension balance will automatically revert to Julie Ann Scott upon the death of the member.

**PAYMENT:**

It was resolved that the trustees have agreed to pay the pension payment for the current year of at least \$390.00 in the frequency of at least an annual payment.

**CLOSURE:**

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

  
.....  
Julie Ann Scott  
Chairperson

## Minutes of a Meeting of the Trustee(s)

held on 1 July 2019 at 24 LEONARD STREET, TOLGA, Queensland 4882

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**PRESENT:**

Julie Ann Scott and Robert William Scott

**PENSION COMMENCEMENT:**

Julie Ann Scott wishes to commence a new Account Based Pension with a commencement date of 01/07/2019.

The Pension Account Balance used to support this pension will be \$19,684.00, consisting of:

- Taxable amount of \$14,184.00; and
- Tax Free amount of \$5,500.00
- Tax Free proportion: 27.94%.

**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 their beneficiary(s).
- 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 is confirmed that the pension balance will automatically revert to Robert William Scott upon the death of the member.

**PAYMENT:**

It was resolved that the trustees have agreed to pay the pension payment for the current year of at least \$390.00 in the frequency of at least an annual payment.

**CLOSURE:**

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

  
.....  
Julie Ann Scott  
Chairperson

1<sup>st</sup> July 2019

Julie Ann Scott  
24 LEONARD STREET  
TOLGA, Queensland 4882

Dear Sir/Madam

**ROBANDJULE SUPERANNUATION FUND**  
**Commencement of Account Based Pension**

I hereby request the trustee to commence a Account Based Pension with a commencement date of 01/07/2019 with \$19,534.00 of the superannuation benefits standing to my member's account in the fund. It is confirmed that the pension balance will automatically revert to Julie Ann Scott upon the death of the member.

This balance contains:

a Taxable Balance of: \$15,034.00; and

a Tax Free Balance of: \$4,500.00.

Tax Free proportion: 23.04%.

I have reached my preservation age and have currently satisfied the condition of release of attaining age 65 under the SIS Act.

I agree to withdraw at least my minimum pension of at least \$390.00 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



.....  
Robert William Scott  
24 LEONARD STREET, TOLGA, Queensland 4882

1<sup>st</sup> July 2019

Julie Ann Scott  
24 LEONARD STREET  
TOLGA, Queensland 4882

Dear Sir/Madam

**ROBANDJULE SUPERANNUATION FUND**  
**Commencement of Account Based Pension**

I hereby request the trustee to commence a Account Based Pension with a commencement date of 01/07/2019 with \$19,684.00 of the superannuation benefits standing to my member's account in the fund. It is confirmed that the pension balance will automatically revert to Robert William Scott upon the death of the member.

This balance contains:

a Taxable Balance of: \$14,184.00; and

a Tax Free Balance of: \$5,500.00.

Tax Free proportion: 27.94%.

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 \$390.00 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

  
.....  
Julie Ann Scott  
24 LEONARD STREET, TOLGA, Queensland 4882