

Member Notification for roll back of an Account Based Pension

To: The Director of Amezdroz Super Pty Ltd ATF Amezdroz
Superannuation Fund

Member Name: Amanda Therese Amezdroz As LPR for Peter Amezdroz
49 Gummow St, Swan Hill VIC 3585

Request to commute an Account Based Pension

I hereby confirm in writing the previous oral request to roll back the Account Based Pension for Peter Amezdroz ('the Member') to their accumulation account at 18/05/2024.

I understand that the current balance of the Account Based Pension is \$685,380.53 and I confirm that at least my pro-rata minimum pension obligation for the current income year has been paid to allow for the roll back of the superannuation income stream.

I declare that the information provided for this request is true and correct, and will inform the Trustee of any omissions or changes required.

I request the Trustee make arrangements to lodge the Transfer Balance Account Report (TBAR) for this commutation to the Australian Taxation Office within the prescribed timeframe.

Signed by the Member

Date

**Trustee Resolutions for Amezdroz Super Pty Ltd
as Trustee for Amezdroz Superannuation Fund**
Re: Roll Back of Account Based Pension

Director: Amanda Therese Amezdroz

Receipt of notification for Roll Back of an Account Based Pension

An initial oral request was received from Amanda Therese Amezdroz as the Legal personal Representative ('LPR') for Peter Amezdroz ('Member') to roll back their Account Based Pension. This request has now been confirmed in writing by the Member, intending to take effect from the nominated roll backdate.

Roll Back date of Pension	18/05/2024
Roll Back Amount (\$)	\$685,380.53

Condition of Release

The Trustee is satisfied that the:

- Account Based Pension for the member can be commuted; and
- Pro-rata minimum pension payment of \$28,750.00 has been made prior to the roll back of the superannuation income stream.

Confirmation of Roll Backdate

In accordance with the Member's request and the Fund's governing rules, the Trustee confirms that the roll back date of the superannuation income stream is on 18/05/2024.

Powers to Roll Back Pension

The Trustee has the power to Roll Back the Account Based Pension pursuant to Rule 39.3 of the Fund's Trust Deed and Regulation 1.07D of the Superannuation Industry (Supervision) Regulations 1994.

Transfer Balance Cap Reporting

As the Member's LPR has chosen to Roll Back the Account Based Pension from the Retirement Phase to their Accumulation Interest, the Fund is required to report the amount as a debit on the member's transfer balance account.

The Trustee authorises this commutation be reported to the Australian Taxation Office by the Tax Agent for the Fund. This will be completed using the approved form within the prescribed reporting timeframe.

Trustee Resolutions

It is resolved that the Trustee will attend to the following matters:

1. Transfer the existing separate Member Superannuation Income Stream Interest for the Account Based Pension back to the Member Accumulation Interest in the accounts and records of the Fund;
2. Ensure that the minimum pension amount has been appropriately deducted from the member's Account Based Pension prior to the roll back of the superannuation income stream to the Member Accumulation Interest;
3. To instruct the Tax Agent of the Fund to report the amount of \$685,380.53 on 18/05/2024 as a debit on the Member's transfer balance account to the ATO within the prescribed time frame;

4. Attend to any other matters relevant to the above resolutions and operation of the Fund, including any tax adjustments in the SMSF Annual Return and financial statements; and
5. Confirm with the Member that the Roll Back of the Account Based Pension has been processed.

A copy of these Trustee Resolutions is to be retained within the records of the Fund for the minimum prescribed period of time.

We hereby agree to and confirm the above Resolutions.

Signed by:
Amanda Therese Amezdroz
Director

Date:

Trustee Notification of Roll Back of Account Based Pension

From: The Trustee
Amezdroz Superannuation Fund

To: Amanda Therese Amezdroz as LPR for Peter Amezdroz
49 Gummow St, Swan Hill VIC 3585

We acknowledge your request and hereby confirm the roll back of the Account Based Pension for Peter Amezdroz from 18/05/2024. We confirm that the commutation date is in accordance with your previous oral request. An amount of \$685,380.53 has been transferred back to the Member's accumulation account.

The Trustee confirms that at least the pro-rata minimum pension amount of \$28,750.00 has been made from the Account Based Pension prior to the roll back of the superannuation income stream.

As a result of the Roll Back of the Account Based Pension, the Fund is required to report this amount as a debit to your transfer balance account. Please note that this reporting requirement will be completed within the prescribed timeframe.

Notification of changes

If you wish to make any change to your previous request regarding the roll back of the Account Based Pension, please contact us in writing as soon as possible.

Signed on behalf of the Director
For Amezdroz Super Pty Ltd

Date: