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MASE Property Investments Pty Ltd ATF S & A Whitaker Superannuation Fund 1 WADE CLOSE **LUDDENHAM NSW 2745** 

Product name: Policy owner(s): OneCare

Mase Property Investments Pty Ltd

ATF S & A Whitaker

Superannuation Fund

Policy number: OnePath reference:

1006145849 1006145849/FYL

20 July 2020

## 2019/2020 INSURANCE PREMIUM SUMMARY

24.2.2020

Dear policy owner,

### Important information for your 2019/2020 tax return.

Thank you for choosing OnePath Life to help protect you and your family.

To help with preparation of your fund's tax return for the year ending 30 June 2020, the following table shows the premium paid on your policy throughout the financial year, and (if applicable) the portion of that premium considered to be for benefits that replace income.

| Life insured      | Cover type          | Total premium paid | Portion of total premium paid for replacement of income benefit/s |
|-------------------|---------------------|--------------------|---|
| Mr Shane Whitaker | Life Cover          | \$1,063.14         | *   |
| Mr Shane Whitaker | Income Secure Basic | \$1,122.37         | \$1,119.00  |
| Mr Shane Whitaker | Super TPD (Working) | \$862.40           | <b>₩</b>  |

The information contained in this letter does not constitute tax advice. We recommend you seek independent tax advice specific to your personal circumstances, from an accountant or registered tax agent.

## Any questions?

If you have any questions or need any further help, please:

- contact your financial adviser, Indeplan Pty Ltd on 0297906277
- call Customer Services on 133 667, weekdays between 8.30am and 6.00pm (AEST)
- email us at customer.risk@onepath.com.au

Yours sincerely,

Jay Tutt

Head of Customer Service & Operations



OnePath Life Limited

ABN 33 009 657 176 AFSL 238341 onepath.com.au

# ONECARE POLICY SCHEDULE

#### DATE

10 January 2020

#### YOUR POLICY SUMMARY

Policy number:

1006145849

Policy owner(s):

MASE Property Investments Pty Ltd

Fund name:

ATF S & A Whitaker Superannuation

Fund

Policy start date:

21 February

2017

Policy anniversary date:

21 February

Linked policy number:

1006145837

|  | First name | Surname  | Date of birth  | Gender     |
|--|------------|----------|----------------|------------|
| Life/lives insured:                    | Shane      | Whitaker | 9 October 1974 | Male       |
| Annual premium before discount(s)*:    |            |          |                | \$3,308.18 |
| Discount(s) - Multi Cover and Package: |            |          |                | \$260.27   |
| Annual premium after discount(s)*:     |            |          |                | \$3,047.91 |
| Includes:                              |            |          |                |            |
| Policy Fee(s)*:                        |            |          |                | \$46.26    |

<sup>\*</sup>Includes stamp duty If applicable.

