

# SUPERANNUATION FUNDS

Reasonable benefit limits (RBL)

reporting form

Warning: This form has been designed by BGL to assist clients to prepare the original RBL form provided by the ATO. This form CANNOT be lodged with the ATO and will not be accepted by them. Only the Original ATO form can be lodged.

## SECTION A: Fund details

\* 1 Fund's tax file number (TFN)

810 959 981

2 Fund's Australian business Number (ABN)

\* 3 Fund's current name

GREENWOOD SUPERANNUATION FUND

4 Fund's previous name if it has changed since last reported

\* 5 Fund's street address

HARTMANN WILSON PTY LTD  
1454 LOGAN ROAD  
MOUNT GRAVATT QLD 4122

6 Fund's postal address (leave blank if same as street address)

3863 MOUNT LINDESAY HIGHWAY  
PARK RIDGE QLD 4125

\* 7 For the purpose of paying this benefit, you were operating as:

- |                                     |                                     |
|-------------------------------------|-------------------------------------|
| Superannuation Fund                 | <input checked="" type="checkbox"/> |
| Approved Deposit Fund               | <input type="checkbox"/>            |
| Life Assurance Company              | <input type="checkbox"/>            |
| Retirement Savings Account Provider | <input type="checkbox"/>            |

8 Fund's contact person

Title

Name

GREENWOOD, FRASER DALTON

Business hours phone number

07 33609600

Facsimile number

**SECTION B: Recipient's Details**

For some benefits paid after the death of a person you must show details of the deceased in this section.

**9 Recipient's TFN**

**10 What is the number you use to identify the recipient ?**

**\* 11 Recipient's name**

Title	
Family name	GREENWOOD
Given names	LORNA SYLVIA

**12 Recipients previous full name if it has changed since last reported**

Title	
Family name	
Given names	

**\* 13 Date of Birth**

**14 Sex**

Male

Female

Information not available

**\* 15 Recipient's postal address (if recipient is deceased enter their last known address)**

3863 MOUNT LINDESA Y HIGHWAY PARK RIDGE QLD 4125
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**16 Has mail sent to the above address been returned to you ?**

Yes

No

**SECTION C: Report Type - new benefit or amendment**

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\* 17 Are you reporting a new benefit or amending details of a benefit previously reported

A New Benefit.  Go to 22  
Amendment  Go to 18

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18 Previously reported benefit payment date

19 Type of benefit previously reported

Lifetime purchased pension or non-purchased pension   
Annuity or non-lifetime purchased pension (including) allocated   
ETP   
Death Benefit ETP   
Direct Roll-over of Commutation or Residual Capital Value or reduction due to marriage breakdown

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20 Amount of benefit previously reported

21 What is the reference number for the benefit previously reported ?

Go to 22

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**SECTION D Benefit Details**

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\* 22 Start date of eligible service period

\* 23 Benefit payment date

24 Number of pre-July 1983 days

25 Number of post-June 1983 days

26 15 February 1990 rollover balance

27 Amount used or paid from 15 February 1990 rollover balance

28 What is your reference number for the benefit being reported ?

29 Is this benefit being paid due to marriage breakdown ? Yes  Go to 30  
No  Go to 31

30 Is the recipient a non-member spouse ? Yes  u Date of birth of member spouse   
No

31 Benefit Type

Lifetime purchased pension or non-purchase pension  Go to 35  
Annuity or non-lifetime purchased pension (including) allocated pension  u Pension or annuity standards met ? Yes  Go to 32  
ETP  No   
Death Benefit ETP  u Go to 32  
Direct Roll-over of Commutation or Residual Capital Value or reduction due to marriage breakdown

\* 32 Payment component details

Capital gains (CGT) exempt component	A	<input type="text"/>
Undeducted contributions	B	<input type="text"/>
Concessional component	C	<input type="text"/>
Pre-July 1983 component	D	<input type="text"/>
Post-June 1983 taxed element	E	<input type="text"/>
Post-June 1983 untaxed element	F	<input type="text"/>
Post-June 1994 invalidity component	G	<input type="text"/>

\* 33 Total benefit amount

H \$

\* 34 Does this benefit arise from a previous pension or annuity?

Yes  Go to 48  
No  u Is this a death benefit ETP? Yes  Go to 54  
No  Go to Section H

**SECTION E: Lifetime purchased pension or non-purchased pension**

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35 Expected payment in year 1

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36 Term of pension  (years)

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37 Undeducted purchase price

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38 Is the pension rebatable ?  
Yes   
No

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39 Rate of indexation

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40 Level of reversion

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41 Does the pension have a residual capital value (RCV)? Yes  or   
No

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42 Pension standards met ? Yes   
No

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43 Was the recipient a member of the fund at 15th August 1989? Yes   
No

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44 Is the pension a disability superannuation pension? Yes   
No

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\* 45 Does this benefit arise from a previous pension ? Yes  Go to 46  
No  Go to Section H

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**SECTION F: Details of a previous pension or annuity from which this benefit arose**

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**46 The benefit arose from the pension or annuity due to:**

Commutation (wholly or partly converted to a lump sum other than because of marriage breakdown)

Marriage breakdown

Residual capital value being paid (lump sum paid at the end of the term of a pension annuity)

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**47 Your reference number for the previous pension or annuity**

**48 Commencement date of the previous pension or annuity**

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**49 Previous benefit type**

Lifetime purchased pension or non purchased pension

Annuity or non-lifetime purchased pension (including allocated pension)

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**50 Did the previous benefit meet the pension or annuity standards?** Yes  Go to 51  
No  Go to 52

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**51 Was marriage breakdown the reason for commutation?** Yes   
No

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**52 Was the reason for the commutation to purchase another pension or annuity that meets the standards?** Yes   
No

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**53 Is the original recipient deceased?** Yes  Go to 54  
No  Go to Section G

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**SECTION G: Beneficiary Details where details of deceased are given in Section B**

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**54 Beneficiary's name**

Title

Family Name

Given name

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**55 Beneficiary's TFN**

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**56 Beneficiary's date of birth**

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**57 Beneficiary's sex**

Male

Female

Information not available

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**58 Beneficiary's postal address**

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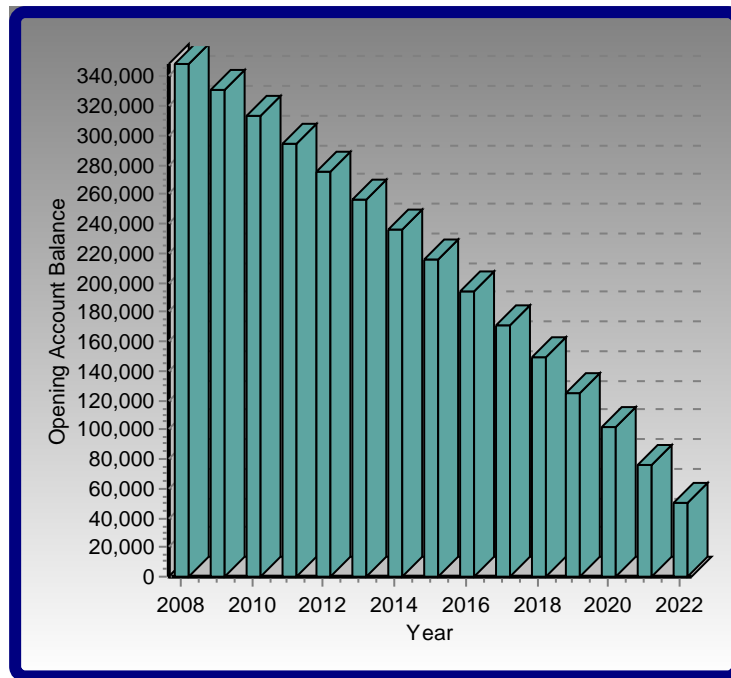
**SECTION H: Declaration**

*\* I am the payer or a person authorised to sign on behalf of the payer, and the information is accurate and complete.*

**Signature**

**Date of signature**

**GREENWOOD SUPERANNUATION FUND  
PENSIONS REPORT AT 30 JUNE 2008**  
**Greenwood, Lorna Sylvia**  
**MINIMUM ACCOUNT-BASED**



Year	Age	Opening Account Balance	Pension Amount*	Closing Balance	Closing Balance plus earnings**
2008	73	348,526	17,430	331,096	331,096
2009	74	331,096	17,953	313,143	313,143
2010	75	313,143	18,491	294,652	294,652
2011	76	294,652	19,046	275,605	275,605
2012	77	275,605	19,618	255,988	255,988
2013	78	255,988	20,206	235,782	235,782
2014	79	235,782	20,812	214,969	214,969
2015	80	214,969	21,437	193,533	193,533
2016	81	193,533	22,080	171,453	171,453
2017	82	171,453	22,742	148,711	148,711
2018	83	148,711	23,424	125,286	125,286
2019	84	125,286	24,127	101,159	101,159
2020	85	101,159	24,851	76,308	76,308
2021	86	76,308	25,597	50,711	50,711
2022	87	50,711	26,364	24,347	24,347

\*Assumes CPI of 3.0%

\*\*Assumes earning rate of 0.00%



**GREENWOOD SUPERANNUATION FUND**  
**PENSIONS CALCULATION SUMMARY REPORT AT 22/05/2008**

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Member Name **Greenwood, Lorna Sylvia**  
Member DOB 20/11/1934  
Pension Start Date 01/04/2008

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**Balance Details at 01/04/2008**

Taxable	109,100.57
Tax Free	239,425.45
Total Benefit	348,526.02
Tax-Free Proportion	68.70%

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**Pension Calculation Year** **2008**

**Below Calculations are based on Opening Balance at 01/04/2008 - 348,526.02**

<b>Pension Type</b>	<b>Minimum Account-Based</b>
Minimum Payment	17,430.00
Maximum Payment	348,530.00

<b>Pension Payable</b>	<b>Year 1*</b>	<b>Annual</b>
Pension Amount	4,333.69	17,430.00
Tax Free Component	2,977.24	11,974.41
Taxable Component	1,356.45	5,455.59

\* Pro-rata for 91 days to 30/06/2008

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**GREENWOOD SUPERANNUATION FUND**  
**MINUTES OF A MEETING OF THE TRUSTEE(S) HELD ON 22/05/2008**  
**AT**

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PRESENT FRASER DALTON GREENWOOD  
LORNA SYLVIA GREENWOOD

PENSION COMMENCEMENT Lorna Sylvia Greenwood  
  
wishes to commence a new  
Minimum Account-Based pension with a commencement date of 01/04/2008  
  
The Pension Account Balance used to support this pension will be \$348,526.02  
  
consisting of a Taxable amount of  
\$109100.57  
  
and a Tax Free amount of  
\$239425.45

TRUSTEE ACKNOWLEDGMENT 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 one of their dependants or cashed as a lump sum to the pensioner's estate.  
- 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 was resolved that the pension will not be reversionary.

PAYMENT It was resolved that the trustees have agreed to pay the pension payment for the year ended 30 June 2008 of  
  
\$ 4333.69 in the frequency of a Yearly payment

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

..... /...../.....  
Fraser Dalton Greenwood

..... /...../.....  
Lorna Sylvia Greenwood

Dear Sir/Madam

RE: Minimum Account-Based pension

I Lorna Sylvia Greenwood am currently a member of Greenwood Superannuation Fund  
I hereby request the trustee(s) to commence a

Minimum Account-Based pension with a commencement date of 01/04/2008 with \$348,526.02  
of the superannuation benefits standing to my member's account in the fund. This balance contains a Taxable Balance of

\$109100.57

and a Tax Free Balance of

\$239425.45

I have reached my preservation age and have currently satisfied a condition of release under the SIS Act. Set out below the  
required amount and the frequency of the payment for the year ended 30 June 2008

Pension Amount: \$ 4333.69 in the frequency of a Yearly payment

The Pension will have no Reversionary Beneficiaries.

Should you have any queries please do not hesitate to contact me.

Yours Sincerely,

.....

Lorna Sylvia Greenwood

DATED: / /

# PAYG Payment Summary - Superannuation Income Stream

## Payment summary for year ending 30 June 2008

Warning: This form has been designed to assist you to prepare the Australian Tax Office's PAYG Payment Summary Statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

### Payee Details

Payee's surname or family name

GREENWOOD

Payee's given name(s)

LORNA SYLVIA

Payee's address

3863 MOUNT LINDESAY HIGHWAY

PARK RIDGE QLD 4125

Date of birth

20/11/1934

**NOTICE TO PAYEE** If this payment summary shows an amount in the total tax withheld box, you must lodge a tax return. If no tax was withheld, you may still have to lodge a tax return. If you have already lodged your tax return, you may need to lodge an amendment request. For more information about this payment summary, lodging your tax return or an amendment request, you can : - visit [www.ato.gov.au](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61

Period of payment 01/07/2007 to 30/06/2008

Payee's Tax File Number

Total Tax withheld

\$

### Taxable component

Taxed element

\$ 1,356

Untaxed element

\$

Tax free component

\$ 2,977

Tax offset amount

\$

Lump sum in arrears - taxable component

\$

Lump sum in arrears - Tax free component

\$

### Payer Details

Payer's ABN or Withholder Payer Number

Branch Number

Payer's Name

GREENWOOD SUPERANNUATION FUND

Signature of authorised person

Date

/ /