

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	Waddell Family Superannuation Fund
Fund ABN	21 680 817 372
Fund Address	PO Box 11 Galston, NSW 2159

2. Member Details

Member's Name	Mrs Lesley Waddell
Date of Birth	12 April 1947
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	502: Waddell, Lesley Frances (ABP1)
Pension Type	Account Based
Start Date	1 July 2007
Reversionary Beneficiary	Leonard John Waddell
Purchase Price	0.00
Account Balance	592,163.58
Date of Balance	30 June 2019
Tax Free Proportion	65.57%

Income Stream Requirements

Minimum Pension	14,800.00
Maximum Pension*	Not Applicable

* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	20,570.00

4. Member Declaration

I intend on drawing income from my Account Based account during the 2019 / 2020 financial year in accordance with the above. I understand it is the Trustee's responsibility to ensure that the member draws an income stream in accordance with the relevant legislation.

Signature

Lesley Waddell

Date

25 / 10 / 20

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2. Member Details

Member's Name	Mrs Lesley Waddell
Date of Birth	12 April 1947
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	508: Waddell, Lesley Frances (ABP3)
Pension Type	Account Based
Start Date	1 April 2012
Reversionary Beneficiary	Leonard John Waddell
Purchase Price	0.00
Account Balance	521,412.81
Date of Balance	30 June 2019
Tax Free Proportion	100.00%

Income Stream Requirements

Minimum Pension	13,040.00
Maximum Pension*	Not Applicable

* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Minimum
Selected Amount	13,040.00

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Signature

Lesley Waddell

Date

25 / 10 / 20

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2. Member Details

Member's Name	Mrs Lesley Waddell
Date of Birth	12 April 1947
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	517: Waddell, Lesley Frances (ABP4)
Pension Type	Account Based
Start Date	20 June 2017
Reversionary Beneficiary	Leonard John Waddell
Purchase Price	180,053.75
Account Balance	192,214.46
Date of Balance	30 June 2019
Tax Free Proportion	99.97%

Income Stream Requirements

Minimum Pension	4,810.00
Maximum Pension*	Not Applicable

* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

Pension Payment Details

Payment Frequency	Yearly
Selected Amount Strategy	Selected
Selected Amount	6,380.00

4. Member Declaration

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Signature

Lesley Waddell

Date

25 / 10 / 20

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For the Financial Year 2019 / 2020**

1. Fund Details

Fund Name	Waddell Family Superannuation Fund
Fund ABN	21 680 817 372
Fund Address	PO Box 11 Galston, NSW 2159

2. Member Details

Member's Name	Mrs Lesley Waddell
Date of Birth	12 April 1947
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	519: Waddell, Lesley Frances (ABP5)
Pension Type	Account Based
Start Date	1 July 2018
Reversionary Beneficiary	Leonard Waddell
Purchase Price	100,515.43
Account Balance	101,650.08
Date of Balance	30 June 2019
Tax Free Proportion	99.49%

Income Stream Requirements

Minimum Pension	2,540.00
Maximum Pension*	Not Applicable

* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	5,080.00

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Signature

Lesley Waddell

Date

25 / 10 / 20

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2. Member Details

Member's Name	Mrs Lesley Waddell
Date of Birth	12 April 1947
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	520: Waddell, Lesley Frances (ABP8)
Pension Type	Account Based
Start Date	1 July 2019
Reversionary Beneficiary	Leonard John Waddell
Purchase Price	100,191.87
Account Balance	100,191.87
Date of Balance	30 June 2019
Tax Free Proportion	99.81%

Income Stream Requirements

Minimum Pension	2,500.00
Maximum Pension*	Not Applicable

* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	5,010.00

4. Member Declaration

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Signature

L.A. Waddell

Date

25 / 10 / 20