

**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	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	501: Waddell, Leonard John (ABP1)
Pension Type	Account Based
Start Date	1 July 2007
Reversionary Beneficiary	Lesley Francis Waddell
Purchase Price	0.00
Account Balance	334,492.92
Date of Balance	30 June 2019
Tax Free Proportion	69.82%

Income Stream Requirements

Minimum Pension	8,360.00
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.

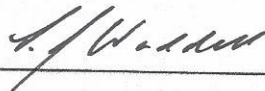
Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	16,720.00

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



Date

25 / 10 / 2020

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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 Mr Leonard Waddell
Date of Birth 23 March 1946
Gender Male
Tax File Number Held Yes
Claim Tax Free Threshold Yes

3. Pension Details

Pension Account 507: Waddell, Leonard John (ABP3)
Pension Type Account Based
Start Date 1 July 2012
Reversionary Beneficiary Lesley Francis Waddell
Purchase Price 0.00
Account Balance 194,320.42
Date of Balance 30 June 2019
Tax Free Proportion 100.00%

Income Stream Requirements

Minimum Pension 4,860.00
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.

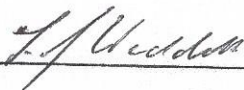
Pension Payment Details

Payment Frequency Yearly
Selected Amount Strategy Selected
Selected Amount 9,720.00

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Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	509: Waddell, Leonard John (ABP4)
Pension Type	Account Based
Start Date	29 June 2013
Reversionary Beneficiary	Lesley Francis Waddell
Purchase Price	0.00
Account Balance	171,537.97
Date of Balance	30 June 2019
Tax Free Proportion	100.00%

Income Stream Requirements

Minimum Pension	4,290.00
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	HalfYearly
Selected Amount Strategy	Selected
Selected Amount	8,580.00

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L J Waddell

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Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	513: Waddell, Leonard John (ABP6)
Pension Type	Account Based
Start Date	10 May 2014
Reversionary Beneficiary	Lesley Francis Waddell
Purchase Price	0.00
Account Balance	108,204.10
Date of Balance	30 June 2019
Tax Free Proportion	100.00%

Income Stream Requirements

Minimum Pension	2,710.00
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	5,410.00

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L. Waddell

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2. Member Details

Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	514: Waddell, Leonard John (ABP7)
Pension Type	Account Based
Start Date	1 July 2014
Reversionary Beneficiary	Lesley Francis Waddell
Purchase Price	40,373.86
Account Balance	42,970.33
Date of Balance	30 June 2019
Tax Free Proportion	99.07%

Income Stream Requirements

Minimum Pension	1,070.00
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.

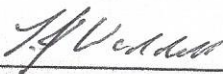
Pension Payment Details

Payment Frequency	Yearly
Selected Amount Strategy	Selected
Selected Amount	2,150.00

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Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	515: Waddell, Leonard John (ABP 8)
Pension Type	Account Based
Start Date	1 July 2015
Reversionary Beneficiary	Lesley Frances Waddell
Purchase Price	125,378.69
Account Balance	134,997.08
Date of Balance	30 June 2019
Tax Free Proportion	99.54%

Income Stream Requirements

Minimum Pension	3,370.00
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	HalfYearly
Selected Amount Strategy	Selected
Selected Amount	6,750.00

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L Waddell

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Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	516: Waddell, Leonard John (ABP 9)
Pension Type	Account Based
Start Date	1 May 2016
Reversionary Beneficiary	Lesley Francis Waddell
Purchase Price	180,458.82
Account Balance	197,542.40
Date of Balance	30 June 2019
Tax Free Proportion	99.75%

Income Stream Requirements

Minimum Pension	4,940.00
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	HalfYearly
Selected Amount Strategy	Selected
Selected Amount	9,880.00

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Member's Name	Mr Leonard Waddell
Date of Birth	23 March 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	518: Waddell, Leonard John (ABP 10)
Pension Type	Account Based
Start Date	23 June 2017
Reversionary Beneficiary	Lesley Frances Waddell
Purchase Price	180,000.00
Account Balance	194,274.80
Date of Balance	30 June 2019
Tax Free Proportion	100.00%

Income Stream Requirements

Minimum Pension	4,860.00
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	Half Yearly
Selected Amount Strategy	Selected
Selected Amount	9,710.00

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