

D.E. Pateman Pty Limited Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2019 to 30 June 2020

Mr Derrel Pateman

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Derrel Pateman ABP1	5,190.00	OK!	5,190.00	OK!	5,190.00	0.00	0.00	18.05%
Derrel Pateman ABP7	5,340.00	OK!	5,340.00	OK!	5,340.00	0.00	0.00	86.76%
Derrel Pateman ABP8	1,080.00	OK!	1,080.00	OK!	1,080.00	0.00	0.00	46.18%
Totals								
Gross Drawdowns	11,610.00	0.00	11,610.00	0.00	11,610.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	11,610.00	0.00	11,610.00	0.00	11,610.00			

Footnotes:

*The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

Pension Payments

Derrel Pateman ABP1

Date	Gross Amount	PAYG	Net Amount	Description
22/11/2019	1,519.41	0.00	1,519.41	part of \$5,000.00 Supa draw down Transfer to xx3523
04/12/2019	1,519.41	0.00	1,519.41	part of \$5,000.00 Supa draw down Transfer to xx3523
27/12/2019	607.76	0.00	607.76	part of \$2,000.00 Super Draw down Transfer to xx3523
25/05/2020	1,543.42	0.00	1,543.42	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	5,190.00	0.00	5,190.00	

Derrel Pateman ABP7

Date	Gross Amount	PAYG	Net Amount	Description
22/11/2019	1,568.32	0.00	1,568.32	part of \$5,000.00 Supa draw down Transfer to xx3523
04/12/2019	1,568.32	0.00	1,568.32	part of \$5,000.00 Supa draw down Transfer to xx3523
27/12/2019	627.32	0.00	627.32	part of \$2,000.00 Super Draw down Transfer to xx3523
25/05/2020	1,576.04	0.00	1,576.04	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	5,340.00	0.00	5,340.00	

Derrel Pateman ABP8

Date	Gross Amount	PAYG	Net Amount	Description
25/05/2020	1,080.00	0.00	1,080.00	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	1,080.00	0.00	1,080.00	

D.E. Pateman Pty Limited Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2019 to 30 June 2020

Mrs Helen Pateman

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Helen Pateman ABP1	1,420.00	OK!	1,420.00	OK!	1,420.00	0.00	0.00	22.58%
Helen Pateman ABP7	5,090.00	OK!	5,090.00	OK!	5,090.00	0.00	0.00	91.31%
Helen Pateman ABP8	3,880.00	OK!	230.00	OK!	3,880.00	0.00	0.00	5.34%
Totals								
Gross Drawdowns	10,390.00	0.00	6,740.00	0.00	10,390.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	10,390.00	0.00	6,740.00	0.00	10,390.00			

Footnotes:

*The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

Pension Payments

Helen Pateman ABP1

Date	Gross Amount	PAYG	Net Amount	Description
22/11/2019	418.11	0.00	418.11	part of \$5,000.00 Supa draw down Transfer to xx3523
04/12/2019	418.11	0.00	418.11	part of \$5,000.00 Supa draw down Transfer to xx3523
27/12/2019	167.25	0.00	167.25	part of \$2,000.00 Super Draw down Transfer to xx3523
25/05/2020	416.53	0.00	416.53	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	1,420.00	0.00	1,420.00	

Helen Pateman ABP7

Date	Gross Amount	PAYG	Net Amount	Description
22/11/2019	1,494.16	0.00	1,494.16	part of \$5,000.00 Supa draw down Transfer to xx3523
04/12/2019	1,494.16	0.00	1,494.16	part of \$5,000.00 Supa draw down Transfer to xx3523
27/12/2019	597.67	0.00	597.67	part of \$2,000.00 Super Draw down Transfer to xx3523
25/05/2020	1,504.01	0.00	1,504.01	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	5,090.00	0.00	5,090.00	

Helen Pateman ABP8

Date	Gross Amount	PAYG	Net Amount	Description
25/05/2020	3,880.00	0.00	3,880.00	part of \$10,000.00 Super draw down Transfer to xx3523
Totals:	3,880.00	0.00	3,880.00	

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mr Derrel Pateman
Date of Birth	19 December 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Derrel Pateman ABP8
Pension Type	Account Based
Start Date	1 July 2019
Reversionary Beneficiary	Helen Pateman
Purchase Price	43,306.18
Account Balance	43,306.18
Date of Balance	30 June 2019
Tax Free Proportion	46.18%

Income Stream Requirements

Minimum Pension	1,080.00
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.

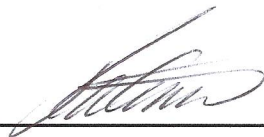
Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Minimum
Selected Amount	1,080.00

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

30 / 1 / 2020

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mr Derrel Pateman
Date of Birth	19 December 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Derrel Pateman ABP7
Pension Type	Account Based
Start Date	1 July 2017
Reversionary Beneficiary	Helen Pateman
Purchase Price	207,464.94
Account Balance	213,731.67
Date of Balance	30 June 2019
Tax Free Proportion	86.76%

Income Stream Requirements

Minimum Pension	5,340.00
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.

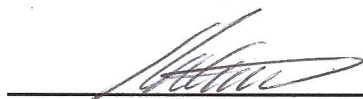
Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Minimum
Selected Amount	5,340.00

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

20 / 6 / 2020

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mr Derrel Pateman
Date of Birth	19 December 1946
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Derrel Pateman ABP1
Pension Type	Account Based
Start Date	1 July 2008
Reversionary Beneficiary	Helen Pateman
Purchase Price	0.00
Account Balance	207,468.77
Date of Balance	30 June 2019
Tax Free Proportion	18.05%

Income Stream Requirements

Minimum Pension	5,190.00
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	5,190.00

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

30 / 1 / 2020

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mrs Helen Pateman
Date of Birth	11 August 1946
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Helen Pateman ABP1
Pension Type	Account Based
Start Date	1 July 2008
Reversionary Beneficiary	Derrel Pateman
Purchase Price	0.00
Account Balance	56,899.40
Date of Balance	30 June 2019
Tax Free Proportion	22.58%

Income Stream Requirements

Minimum Pension	1,420.00
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	1,420.00

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

H. Pateman

Date

30 / 6 / 2020

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mrs Helen Pateman
Date of Birth	11 August 1946
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Helen Pateman ABP7
Pension Type	Account Based
Start Date	1 July 2017
Reversionary Beneficiary	Derrel Pateman
Purchase Price	197,680.85
Account Balance	203,649.86
Date of Balance	30 June 2019
Tax Free Proportion	91.31%

Income Stream Requirements

Minimum Pension	5,090.00
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	5,090.00

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

H. Pateman

Date

30 / 6 / 2020

Annual Pension Review Statement For the Financial Year 2019 / 2020

1. Fund Details

Fund Name	D.E. Pateman Pty Limited Superannuation Fund
Fund ABN	38 115 936 014
Fund Address	PO Box 97 GALSTON, NSW 2159

2. Member Details

Member's Name	Mrs Helen Pateman
Date of Birth	11 August 1946
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Helen Pateman ABP8
Pension Type	Account Based
Start Date	1 July 2019
Reversionary Beneficiary	Derrel Pateman
Purchase Price	9,365.28
Account Balance	9,365.28
Date of Balance	30 June 2019
Tax Free Proportion	5.34%

Income Stream Requirements

Minimum Pension	230.00
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	Net
Selected Amount	3,880.00

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

H. Pateman

Date

30 / 6 / 2020