

The Phillips Family Superannuation Fund Centrelink / DVA Schedule



Depending on your individual circumstances, it may be necessary for you to provide this schedule to your local Centrelink or Department of Veterans' Affairs (DVA) office to work out your benefit entitlement. Please contact your Centrelink or DVA office for details.

Provider Details

Provider Name	The Phillips Family Superannuation Fund
Provider ABN	20413105806
Provider Address	25 Clovelly Place, Sandstone Point, Queensland, 4511
Provider Contact Name	Lisa Phillips
Provider Contact Phone Number	0405227645

Product Details

Client Name	ARTHUR PHILLIPS
Product Name	SMSF Pension
Product Reference Number	PHIART00004P
Type of Income Stream	Allocated
Has this income stream been split as part of a property settlement on marriage breakdown ?	No
Is this Income stream paid from a SMSF or SAF ?	Yes
Does the income stream meet all of the characteristics required under section 9A, 9B or 9BA of the Social Security Act 1991 OR section 5JA, 5JB or 5JBA of the Veterans' Entitlements Act 1986 to qualify as asset test exempt income stream ?	No
Is the income stream eligible to retain asset test exempt status ?	No
Commencement Date / Purchase Date	01/07/2020
Relevant Number (at commencement date)	28.75
Tax Free Proportion	18.12%
Reversionary beneficiary nominated	Yes
Original Purchase Price	\$251,624.36
Commutations	No
Gross Annual Payment	\$7,770.00
Account Balance at 01 July 2022	\$310,652.87
Current Account Balance	\$314,896.79
Date of Current Account Balance	30/06/2023

TRUSTEE SIGNATURE

Date: / /