

PAYG Payment Summary - Superannuation Income Stream

Payment summary for year ending 30 June 2021

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

LEESON

Payee's given name(s)

LORRAINE JOYCE

Payee's address

3 HEATON STREET

JURIEN BAY WA 6516

Date of birth

09/09/1949

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 - refer to TaxPack - phone 13 28 61

Period of payment 01/07/2020 to 30/06/2021

Payee's Tax File Number

623464551

Total Tax withheld

\$

Taxable component

Taxed element

\$

64,365

Untaxed element

\$

Tax free component

\$

85,635

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

12339101988

Branch Number

Payer's Name

GL & LJ LEESON SUPERANNUATION FUND

Signature of authorised person

Date

/ /

**GL & LJ LEESON SUPERANNUATION FUND
PENSIONS CALCULATION SUMMARY REPORT AT 10/11/2021**

Member Name **Leeson, Lorraine Joyce**
Member Account 502
Member DOB 09/09/1949
Pension Start Date 01/07/2012
Age at Start Date 62

Balance Details at 01/07/2012

Taxable 64,361.34
Tax Free 85,638.66
Total Benefit 150,000.00
Tax-Free Proportion 57.09%

Pension Calculation Year 2021

Age at 01/07/2020 70

Below Calculations are based on Account Balance at 01/07/2020 of 1,019,626.13

Pension Type Minimum Account-Based
Minimum Payment Factor 2.50% (includes 50% reduction)
Maximum Payment Factor N/A
Minimum Payment 25,490.00
Maximum Payment 1,019,626.13

Pension Payable	Year 9	Annual
Pension Amount	150,000.00	150,000.00
Tax Free Component	85,635.00	85,635.00
Taxable Component	64,365.00	64,365.00

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Payee Details

Payee's surname or family name

LEESON

Payee's given name(s)

GRAHAM LESLIE

Payee's address

3 HEATON STREET

JURIEN BAY WA 6516

Date of birth

11/02/1945

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Period of payment 01/07/2020 to 30/06/2021

Payee's Tax File Number

621418394

Total Tax withheld

\$

Taxable component

Taxed element

\$

29,372

Untaxed element

\$

Tax free component

\$

66,709

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

12339101988

Branch Number

Payer's Name

GL & LJ LEESON SUPERANNUATION FUND

Signature of authorised person

Date

/ /

GL & LJ LEESON SUPERANNUATION FUND
PENSIONS CALCULATION SUMMARY REPORT AT 10/11/2021

Member Name	Leeson, Graham Leslie
Member Account	501
Member DOB	11/02/1945
Pension Start Date	01/07/2009
Age at Start Date	64

Balance Details at 01/07/2009

Taxable	29,376.50
Tax Free	66,705.47
Total Benefit	96,081.97
Tax-Free Proportion	69.43%

Pension Calculation Year 2021

Age at 01/07/2020 75

Below Calculations are based on Account Balance at 01/07/2020 of 540,281.04

Pension Type	Minimum Account-Based
Minimum Payment Factor	3.00% (includes 50% reduction)
Maximum Payment Factor	N/A
Minimum Payment	16,210.00
Maximum Payment	540,281.04

Pension Payable	Year 12	Annual
Pension Amount	96,082.00	96,082.00
Tax Free Component	66,709.73	66,709.73
Taxable Component	29,372.27	29,372.27

5th February 2021

GL Leeson & Co
PO Box 570
JURIEN BAY WA 6516

Please note that your account with your Superannuation Fund is in or available for Pension Phase, and you are required to withdraw a minimum amount each year based on the balance of your fund the previous year and what age you are. This makes the earnings of the fund non taxable.

Based on the above factors, you are required to withdraw a minimum amount for 2020/21 financial year of:

GL LEESON	\$16,500	96,082
LJ LEESON	\$25,500	150,000

This minimum amount must be withdrawn before the 30/06/2021. Please note that there is no maximum amount (other than your account balance). ***This minimum amount includes payments that may have been withdrawn from the 1st July 2020.***

Please note that the withdrawal must go into a personal bank account.

If you have any queries, then please call.

Regards

Lindsay Carter