

# Annual Pension Review Statement For the Financial Year 2022 / 2023

## 1. Fund Details

Fund Name	Burdekin Superannuation Fund
Fund ABN	37 936 403 505
Fund Address	PO Box 371 Galston, NSW 2159

## 2. Member Details

Member's Name	Mr Roy Burdekin
Date of Birth	17 December 1934
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	501: Burdekin, Roy
Pension Type	Account Based
Start Date	1 July 2007
Reversionary Beneficiary	Not recorded
Purchase Price	0.00
Account Balance	355,804.60
Date of Balance	30 June 2022
Tax Free Proportion	36.45%

## Income Stream Requirements

Minimum Pension	16,010.00
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	16,010.00

## 4. Member Declaration

I intend on drawing income from my Account Based account during the 2022 / 2023 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

R. Burdekin

Date

10 / 1 / 2022

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## 1. Fund Details

Fund Name	Burdekin Superannuation Fund
Fund ABN	37 936 403 505
Fund Address	PO Box 371 Galston, NSW 2159

## 2. Member Details

Member's Name	Mr Roy Burdekin
Date of Birth	17 December 1934
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	502: Burdekin, Roy
Pension Type	Account Based
Start Date	1 July 2007
Reversionary Beneficiary	Not recorded
Purchase Price	0.00
Account Balance	419,079.50
Date of Balance	30 June 2022
Tax Free Proportion	81.91%

## Income Stream Requirements

Minimum Pension	18,860.00
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	Monthly
Selected Amount Strategy	Minimum
Selected Amount	18,860.00

## 4. Member Declaration

I intend on drawing income from my Account Based account during the 2022 / 2023 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

R. Burdekin

Date

10 / 10 / 2022

# Annual Pension Review Statement For the Financial Year 2022 / 2023

## 1. Fund Details

Fund Name	Burdekin Superannuation Fund
Fund ABN	37 936 403 505
Fund Address	PO Box 371 Galston, NSW 2159

## 2. Member Details

Member's Name	Mr Roy Burdekin
Date of Birth	17 December 1934
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	503: Burdekin, Roy
Pension Type	Account Based
Start Date	1 July 2008
Reversionary Beneficiary	Not recorded
Purchase Price	0.00
Account Balance	164,644.71
Date of Balance	30 June 2022
Tax Free Proportion	100.00%

## Income Stream Requirements

Minimum Pension	7,410.00
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	7,410.00

## 4. Member Declaration

I intend on drawing income from my Account Based account during the 2022 / 2023 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

R Burdekin

Date

10 / 10 / 2022