

Electro Optics Pty Ltd Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2021 to 30 June 2022

Mr Philip Montgomery
YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Philip Montgomery ABP1	42,480.00	OK!	38,310.00	OK!	42,480.00	-	-	39.54%
Philip Montgomery ABP2	17,520.00	OK!	17,520.00	OK!	17,520.00	-	-	54.44%
Totals								
Gross Drawdowns	60,000.00	0.00	55,830.00	0.00	60,000.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	60,000.00	0.00	55,830.00	0.00	60,000.00			

Footnotes:

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

Annual Pension Review Statement For the Financial Year 2021 / 2022

1. Fund Details

Fund Name	Electro Optics Pty Ltd Superannuation Fund
Fund ABN	69 259 212 960
Fund Address	84 Porters Road Kenthurst, NSW 2156

2. Member Details

Member's Name	Mr Philip Montgomery
Date of Birth	26 August 1943
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Philip Montgomery ABP1
Pension Type	Account Based
Start Date	1 July 2008
Reversionary Beneficiary	Sue montgomery
Purchase Price	0.00
Account Balance	1,277,086.87
Date of Balance	30 June 2021
Tax Free Proportion	39.54%

Income Stream Requirements

Minimum Pension	38,310.00
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	42,480.00

4. Member Declaration

I intend on drawing income from my Account Based account during the 2021 / 2022 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 / 06 / 2022

Annual Pension Review Statement For the Financial Year 2021 / 2022

1. Fund Details

Fund Name	Electro Optics Pty Ltd Superannuation Fund
Fund ABN	69 259 212 960
Fund Address	84 Porters Road Kenthurst, NSW 2156

2. Member Details

Member's Name	Mr Philip Montgomery
Date of Birth	26 August 1943
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

3. Pension Details

Pension Account	Philip Montgomery ABP2
Pension Type	Account Based
Start Date	1 July 2010
Reversionary Beneficiary	Sue Montgomery
Purchase Price	0.00
Account Balance	584,090.53
Date of Balance	30 June 2021
Tax Free Proportion	54.44%

Income Stream Requirements

Minimum Pension	17,520.00
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.

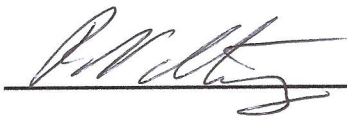
Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Minimum
Selected Amount	17,520.00

4. Member Declaration

I intend on drawing income from my Account Based account during the 2021 / 2022 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 / 06 / 2022