

# **WISSEL 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	WISSEL SUPERANNUATION FUND
Provider ABN	32987135494
Provider Address	PO Box 1777, Wollongong Dc, New South Wales, 2500
Provider Contact Name	Blue Chip Super
Provider Contact Phone Number	1300975999

## **Product Details**

Client Name	WILLIAM GEARY
Product Name	SMSF Pension
Product Reference Number	501
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 example income stream ?	No
Is the income stream eligible to retain asset test exempt status ?	No
Commencement Date / Purchase Date	20/10/2007
Relevant Number (at commencement date)	N/A
Tax Free Proportion	46.85%
Reversionary beneficiary nominated	No
Original Purchase Price	\$357,965.58
Commutations	Yes  16/11/2016     \$42,080.00  14/12/2016     \$100,000.00
Gross Annual Payment	\$14,000.00
Account Balance at 1 July 2019	\$188,162.28
Current Account Balance	\$174,162.28
Date of Current Account Balance	13/03/2020

TRUSTEE SIGNATURE .....

Date:    /    /

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### Product Details

Client Name	SUSAN STRAHAN-GEARY
Product Name	SMSF Pension
Product Reference Number	STRSUS00002P
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 example income stream ?	No
Is the income stream eligible to retain asset test exempt status ?	No
Commencement Date / Purchase Date	01/09/2018
Relevant Number (at commencement date)	N/A
Tax Free Proportion	57.76%
Reversionary beneficiary nominated	No
Original Purchase Price	\$679,511.25
Commutations	No
Gross Annual Payment	\$50,000.00
Account Balance at 1 July 2019	\$617,360.61
Current Account Balance	\$567,360.61
Date of Current Account Balance	13/03/2020

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Date:    /    /