

**Diro Superannuation Fund**  
**Pension Summary**

As at 01 July 2020

**Member Name :** Nisbet, Robert  
**Member Age :** 83\* (Date of Birth : Provided)

Member Code	Pension Type	Pension Start Date	Tax Free	Min / PF	Minimum	Maximum	Gross Pension Payments	PAYG	Net Pension Payment	Amount to reach Minimum
NISROB0003P	Account Based Pension	01/07/2010	79.08%	3.50%	\$8,550.00*	N/A	\$0.00	\$0.00	\$0.00	\$8,550.00

\*COVID-19 50% reduction has been applied to the minimum pension amount.

NISROB0004P	Market Linked Pension	01/07/2004	46.81%	9.00	\$20,317.50*	\$49,665.00	\$0.00	\$0.00	\$0.00	\$20,317.50
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\*COVID-19 50% reduction has been applied to the minimum pension amount.

					<b>\$28,867.50</b>	<b>\$49,665.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$28,867.50</b>
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**Member Name :** Nisbet, Dian  
**Member Age :** 84\* (Date of Birth : Provided)

Member Code	Pension Type	Pension Start Date	Tax Free	Min / PF	Minimum	Maximum	Gross Pension Payments	PAYG	Net Pension Payment	Amount to reach Minimum
NISDIA0002P	Account Based Pension	01/07/2010	79.63%	3.50%	\$8,090.00*	N/A	\$0.00	\$0.00	\$0.00	\$8,090.00

\*COVID-19 50% reduction has been applied to the minimum pension amount.

NISDIA0003P	Market Linked Pension	01/07/2004	44.90%	10.30	\$19,426.50*	\$47,487.00	\$0.00	\$0.00	\$0.00	\$19,426.50
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\*COVID-19 50% reduction has been applied to the minimum pension amount.

					<b>\$27,516.50</b>	<b>\$47,487.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$27,516.50</b>
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<b>Total :</b>					<b>\$56,384.00</b>	<b>\$97,152.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$56,384.00</b>
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**Diro Superannuation Fund**  
**Pension Summary**

As at 01 July 2020

\*Age as at 01/07/2020 or pension start date for new pensions.

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10 May 2021

Robert Nisbet  
Diro Superannuation Fund  
2 Kahibah Road, Mosman, New South Wales 2088

Dear Sir/Madam

**Diro Superannuation Fund  
Continuation of Account Based Pension**

We have recently completed a review of the assets of **Diro Superannuation Fund** and your Account Based Pension account in the Fund as at 01 July 2020. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Account Based Pension, I have set out below the Minimum income stream which must be taken for the year ending 01 July 2020.

Your balance contains:

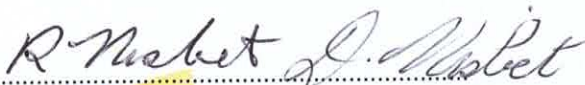
- a Taxable Balance of: \$51,131.18; and
- a Tax Free Balance of: \$193,273.63

Tax Free proportion: 79.08%.

Your Minimum income stream applicable is \$8,550.00.

If you have any queries with regard to the above, please do not hesitate to contact me.

Yours sincerely



Robert Nisbet  
2 Kahibah Road, Mosman, New South Wales 2088

10 May 2021

Robert Nisbet  
Diro Superannuation Fund  
2 Kahibah Road, Mosman, New South Wales 2088

Dear Sir/Madam

**Diro Superannuation Fund  
Continuation of Market Linked Pension**

We have recently completed a review of the assets of **Diro Superannuation Fund** and your Market Linked Pension account in the Fund as at 01 July 2020. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Market Linked Pension, I have set out below the Minimum income stream which must be taken for the year ending 01 July 2020.

Your balance contains:

- a Taxable Balance of: \$216,131.73; and
- a Tax Free Balance of: \$190,243.75

Tax Free proportion: 46.81%.

Your Minimum income stream applicable is \$20,317.50.

If you have any queries with regard to the above, please do not hesitate to contact me.

Yours sincerely



Robert Nisbet  
2 Kahibah Road, Mosman, New South Wales 2088

10 May 2021

Dian Nisbet  
Diro Superannuation Fund  
2 Kahibah Road, Mosman, New South Wales 2088

Dear Sir/Madam

**Diro Superannuation Fund  
Continuation of Account Based Pension**

We have recently completed a review of the assets of **Diro Superannuation Fund** and your Account Based Pension account in the Fund as at 01 July 2020. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Account Based Pension, I have set out below the Minimum income stream which must be taken for the year ending 01 July 2020.

Your balance contains:

- a Taxable Balance of: \$47,073.92; and
- a Tax Free Balance of: \$184,049.62

Tax Free proportion: 79.63%.

Your Minimum income stream applicable is \$8,090.00.

If you have any queries with regard to the above, please do not hesitate to contact me.

Yours sincerely



Dian Nisbet  
2 Kahibah Road, Mosman, New South Wales 2088

10 May 2021

Dian Nisbet  
Diro Superannuation Fund  
2 Kahibah Road, Mosman, New South Wales 2088

Dear Sir/Madam

**Diro Superannuation Fund  
Continuation of Market Linked Pension**

We have recently completed a review of the assets of **Diro Superannuation Fund** and your Market Linked Pension account in the Fund as at 01 July 2020. The pension does not have a reversionary beneficiary.

Based on the account balance and the legislative requirements for Market Linked Pension, I have set out below the Minimum income stream which must be taken for the year ending 01 July 2020.

Your balance contains:

- a Taxable Balance of: \$245,025.92; and
- a Tax Free Balance of: \$199,632.89

Tax Free proportion: 44.90%.

Your Minimum income stream applicable is \$19,426.50.

If you have any queries with regard to the above, please do not hesitate to contact me.

Yours sincerely



Dian Nisbet  
2 Kahibah Road, Mosman, New South Wales 2088

**Diro Superannuation Fund**

**Minutes of a Meeting of the Trustee(s)**

held on 10 May 2021 at 2 Kahibah Road, Mosman, New South Wales 2088

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**PRESENT:**

Robert Nisbet and Dian Nisbet

**PENSION CONTINUATION:**

Robert Nisbet wishes to continue existing Account Based Pension with a commencement date of 01/07/2010. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2020 \$244,404.81, consisting of:

- Taxable amount of \$51,131.18; and
- Tax Free amount of \$193,273.63
- Tax Free proportion: 79.08%.

**TRUSTEE ACKNOWLEDGEMENT:**

It was resolved that Trustee(s) have agreed to this and has taken action to ensure the following:

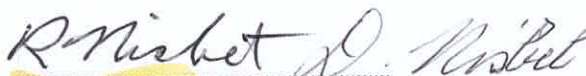
- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The fund's trust deed provides for payment of this pension to the member
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount each year

**PAYMENT:**

It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$8,550.00 in the frequency of at least an annual payment.

**CLOSURE:**

Signed by the trustee(s) pursuant to the Fund Deed.



Robert Nisbet  
Chairperson

**Diro Superannuation Fund**

**Minutes of a Meeting of the Trustee(s)**

held on 10 May 2021 at 2 Kahibah Road, Mosman, New South Wales 2088

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**PRESENT:** Robert Nisbet and Dian Nisbet

**PENSION CONTINUATION:** Robert Nisbet wishes to continue existing Market Linked Pension with a commencement date of 01/07/2004. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2020 \$406,375.48, consisting of:


- Taxable amount of \$216,131.73; and
- Tax Free amount of \$190,243.75
- Tax Free proportion: 46.81%.

**TRUSTEE ACKNOWLEDGEMENT:** It was resolved that Trustee(s) have agreed to this and has taken action to ensure the following:

- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The fund's trust deed provides for payment of this pension to the member
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount each year

**PAYMENT:** It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$20,317.50 in the frequency of at least an annual payment.

**CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.

  
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Robert Nisbet  
Chairperson



**Diro Superannuation Fund**

**Minutes of a Meeting of the Trustee(s)**

held on 10 May 2021 at 2 Kahibah Road, Mosman, New South Wales 2088

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**PRESENT:** Robert Nisbet and Dian Nisbet

**PENSION CONTINUATION:** Dian Nisbet wishes to continue existing Account Based Pension with a commencement date of 01/07/2010. The pension does not have a reversionary beneficiary.

The Pension Account Balance as at 01/07/2020 \$231,123.54, consisting of:

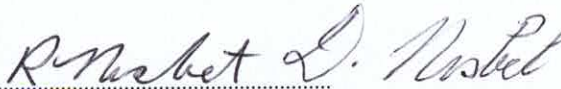
- Taxable amount of \$47,073.92; and
- Tax Free amount of \$184,049.62
- Tax Free proportion: 79.63%.

**TRUSTEE ACKNOWLEDGEMENT:** It was resolved that Trustee(s) have agreed to this and has taken action to ensure the following:

- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The fund's trust deed provides for payment of this pension to the member
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount each year

**PAYMENT:** It was resolved that the trustees have agreed to pay at least the minimum pension payment for the current year of \$8,090.00 in the frequency of at least an annual payment.

**CLOSURE:** Signed by the trustee(s) pursuant to the Fund Deed.



Robert Nisbet  
Chairperson