

23RD April 2021

SPRINGFIELD RETIREMENT FUND
7/98 Canning Rd
KALAMUNDA WA 6076

Dear Diane

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 20120/2021 financial year of:

D BENNIT \$15,000 (Was \$30,000)

Government announced in March 2020 a reduction of 50% in amount to be withdrawn due to effect of Virus.

This minimum amount must be withdrawn before the 30/06/2021.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 ***This minimum amount includes payments that may have been withdrawn from the 1st July 2020.***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 or must be to pay for something personal.

If you have any queries, then please call.

Regards,

Robert J Woodgate

23rd April 2021

SPRINGFIELD RETIREMENT FUND
192 Emerald Road
MANJIMUP WA 6258

Dear William

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 2020/2021 financial year of:

W BENNIT \$11,000 (Was \$22,000)

Government announced in March 2020 a reduction of 50% in amount to be withdrawn due to effect of Virus.

This minimum amount must be withdrawn before the 30/06/2021.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 ***This minimum amount includes payments that may have been withdrawn from the 1st July 2020.***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 or must be to pay for something personal.

If you have any queries, then please call.

Regards,

Robert J Woodgate

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

BENNIT

Payee's given name(s)

DIANE ELIZABETH

Payee's address

7/98 CANNING ROAD

KALAMUNDA WA 6076

Date of birth

21/04/1941

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

622176358

Total Tax withheld

\$

Taxable component

Taxed element

\$ 28,000

Untaxed element

\$

Tax free component

\$

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

26791355832

Branch Number

Payer's Name

SPRINGFIELD RETIREMENT FUND

Signature of authorised person

Date

/ /

SPRINGFIELD RETIREMENT FUND
PENSIONS CALCULATION SUMMARY REPORT AT 24/11/2021

Member Name **Bennit, Diane Elizabeth**
 Member Account 501
 Member DOB 21/04/1941
 Pension Start Date 01/07/2007
 Age at Start Date 66

Balance Details at 01/07/2007

Taxable 28,000.00
 Tax Free 0.00
 Total Benefit 28,000.00
 Tax-Free Proportion 0.00%

Pension Calculation Year 2021

Age at 01/07/2020 79

Below Calculations are based on Account Balance at 01/07/2020 of 46,484.37

Pension Type Minimum Account-Based

Minimum Payment Factor 3.00% (includes 50% reduction)
 Maximum Payment Factor N/A
 Minimum Payment 1,390.00
 Maximum Payment 46,484.37

| Pension Payable | Year 14 | Annual |
|------------------------|----------------|---------------|
| Pension Amount | 28,000.00 | 28,000.00 |
| Tax Free Component | 0.00 | 0.00 |
| Taxable Component | 28,000.00 | 28,000.00 |

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

BENNIT

Payee's given name(s)

WILLIAM EDMUND

Payee's address

29 ASHURST DVE

LESMURDIE WA 6076

Date of birth

20/08/1946

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

623508927

Total Tax withheld

\$

Taxable component

Taxed element

\$ 1,209

Untaxed element

\$

Tax free component

\$ 17,093

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

26791355832

Branch Number

Payer's Name

SPRINGFIELD RETIREMENT FUND

Signature of authorised person

Date

/ /

**SPRINGFIELD RETIREMENT FUND
PENSIONS CALCULATION SUMMARY REPORT AT 24/11/2021**

| | |
|--------------------|-------------------------------|
| Member Name | Bennit, William Edmund |
| Member Account | 504 |
| Member DOB | 20/08/1946 |
| Pension Start Date | 30/06/2016 |
| Age at Start Date | 69 |

Balance Details at 30/06/2016

| | |
|---------------------|-----------|
| Taxable | 1,209.20 |
| Tax Free | 17,093.80 |
| Total Benefit | 18,303.00 |
| Tax-Free Proportion | 93.39% |

Pension Calculation Year 2021

Age at 01/07/2020 73

Below Calculations are based on Account Balance at 01/07/2020 of 361,455.21

| | |
|------------------------|--------------------------------|
| Pension Type | Minimum Account-Based |
| Minimum Payment Factor | 2.50% (includes 50% reduction) |
| Maximum Payment Factor | N/A |
| Minimum Payment | 9,040.00 |
| Maximum Payment | 361,455.21 |

| Pension Payable | Year 6 | Annual |
|------------------------|---------------|---------------|
| Pension Amount | 18,303.00 | 18,303.00 |
| Tax Free Component | 17,093.17 | 17,093.17 |
| Taxable Component | 1,209.83 | 1,209.83 |
