

# Annual Pension Review Statement For the Financial Year 2019 / 2020

## 1. Fund Details

Fund Name	Donson Superannuation Fund
Fund ABN	68 853 604 580
Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP1)
Pension Type	Account Based
Start Date	1 July 2013
Reversionary Beneficiary	Not recorded
Purchase Price	0.00
Account Balance	590,213.93
Date of Balance	30 June 2019
Tax Free Proportion	81.46%

## Income Stream Requirements

Minimum Pension	14,760.00
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.

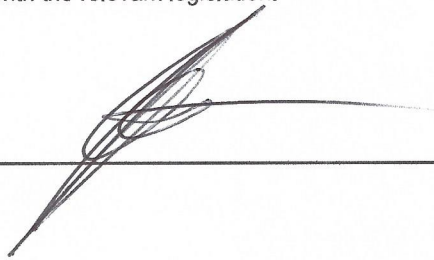
## Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	135,010.00

## 4. Member Declaration

I intend on drawing income from my Account Based account during the 2019 / 2020 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

1 / 7 / 19

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Fund Name	Donson Superannuation Fund
Fund ABN	68 853 604 580
Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP2)
Pension Type	Account Based
Start Date	1 July 2014
Reversionary Beneficiary	Not recorded
Purchase Price	128,608.23
Account Balance	132,786.75
Date of Balance	30 June 2019
Tax Free Proportion	95.35%

## Income Stream Requirements

Minimum Pension	3,320.00
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.

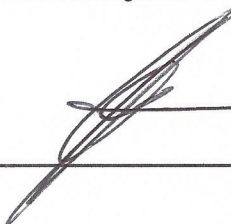
## Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	6,640.00

## 4. Member Declaration

I intend on drawing income from my Account Based account during the 2019 / 2020 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

1 / 7 / 19

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## 1. Fund Details

Fund Name	Donson Superannuation Fund
Fund ABN	68 853 604 580
Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP3)
Pension Type	Account Based
Start Date	5 July 2015
Reversionary Beneficiary	Not recorded
Purchase Price	28,058.10
Account Balance	28,234.71
Date of Balance	30 June 2019
Tax Free Proportion	90.67%

## Income Stream Requirements

Minimum Pension	710.00
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.

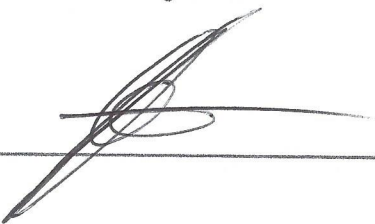
## Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	1,410.00

## 4. Member Declaration

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Signature



Date

1, 7, 19

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Fund Name	Donson Superannuation Fund
Fund ABN	68 853 604 580
Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP4)
Pension Type	Account Based
Start Date	1 July 2016
Reversionary Beneficiary	Not recorded
Purchase Price	68,080.45
Account Balance	74,201.41
Date of Balance	30 June 2019
Tax Free Proportion	96.93%

## Income Stream Requirements

Minimum Pension	1,860.00
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.

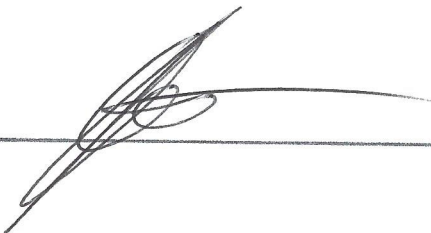
## Pension Payment Details

Payment Frequency	Monthly
Selected Amount Strategy	Selected
Selected Amount	3,710.00

## 4. Member Declaration

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Signature



Date

1, 7, 19

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Fund ABN	68 853 604 580
Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP5)
Pension Type	Account Based
Start Date	1 July 2019
Reversionary Beneficiary	Not recorded
Purchase Price	8,909.41
Account Balance	8,909.41
Date of Balance	30 June 2019
Tax Free Proportion	1.87%

## Income Stream Requirements

Minimum Pension	220.00
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	HalfYearly
Selected Amount Strategy	Selected
Selected Amount	3,720.00

## 4. Member Declaration

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Signature \_\_\_\_\_



Date \_\_\_\_\_

1, 7, 19

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Fund Address	67 Palmgrove Road Avalon, NSW 2107

## 2. Member Details

Member's Name	Mr Donald Robertson
Date of Birth	4 July 1950
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

## 3. Pension Details

Pension Account	Donald Robertson (ABP 6)
Pension Type	Account Based
Start Date	8 April 2020
Reversionary Beneficiary	Not recorded
Purchase Price	103,183.25
Account Balance	103,183.25
Date of Balance	7 April 2020
Tax Free Proportion	97.38%

## Income Stream Requirements

Minimum Pension	590.00
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	Yearly
Selected Amount Strategy	Minimum
Selected Amount	590.00

## 4. Member Declaration

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Signature \_\_\_\_\_

Date

8 / 4 / 20