# **Mr Scott Smith**

# **YTD Summaries**

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Scott Smith ABP 1	11,970.00	OK!	11,970.00	OK!	11,970.00	0.00	0.00	13.88%
Scott Smith ABP 2	4,780.00	OK!	4,780.00	OK!	4,780.00	0.00	0.00	80.44%
Scott Smith ABP 3	3,570.00	OK!	3,570.00	OK!	3,570.00	0.00	0.00	100.00%
Scott Smith ABP 4	1,040.00	OK!	1,040.00	OK!	1,040.00	0.00	0.00	19.64%
Scott Smith ABP 5	5,090.00	OK!	4,890.00	OK!	5,090.00	0.00	0.00	2.91%
Scott Smith ABP 6	1,420.00	OK!	1,420.00	OK!	1,420.00	0.00	0.00	11.82%
Scott Smith ABP 7	3,340.00	OK!	3,340.00	OK!	3,340.00	0.00	0.00	53.16%
Totals								
Gross Drawdowns	31,210.00	0.00	31,010.00	0.00	31,210.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	31,210.00	0.00	31,010.00	0.00	31,210.00			

### Footnotes:

<sup>\*</sup>The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

# **Mr Scott Smith**

Pension Payments				
Scott Smith ABP 1				
Date	Gross Amount	PAYG	Net Amount	Description
29/01/2020	1,133.52	0.00	1,133.52	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	2,267.05	0.00	2,267.05	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	2,267.04	0.00	2,267.04	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	4,534.09	0.00	4,534.09	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	1,768.30	0.00	1,768.30	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	11,970.00	0.00	11,970.00	part of to, occord in the rate of the rate occords
Scott Smith ABP 2	1 1,01 0.00	0.00	11,070.00	
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	452.65	0.00	452.65	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	905.30	0.00	905.30	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	905.30	0.00	905.30	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,810.61	0.00	1,810.61	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	706.14	0.00	706.14	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	4,780.00	0.00	4,780.00	
Scott Smith ABP 3				
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	338.07	0.00	338.07	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	676.14	0.00	676.14	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	676.13	0.00	676.13	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,352.27	0.00	1,352.27	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	527.39	0.00	527.39	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	3,570.00	0.00	3,570.00	
Scott Smith ABP 4				
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	98.48	0.00	98.48	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	196.97	0.00	196.97	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	196.97	0.00	196.97	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	393.94	0.00	393.94	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	153.64	0.00	153.64	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	1,040.00	0.00	1,040.00	
Scott Smith ABP 5				
Date	Gross Amount	PAYG		Description
29/01/2020	463.07	0.00	463.07	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	926.14	0.00	926.14	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	926.13	0.00	926.13	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,852.27	0.00	1,852.27	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	922.39	0.00	922.39	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals: Scott Smith ABP 6	5,090.00	0.00	5,090.00	
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	134.47	0.00	134.47	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	268.94	0.00	268.94	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	268.94	0.00	268.94	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	537.88	0.00	537.88	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	209.77	0.00	209.77	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	1,420.00	0.00	1,420.00	
Scott Smith ABP 7				
Date	Gross Amount	PAYG		Description
29/01/2020	316.29	0.00	316.29	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	632.58	0.00	632.58	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	632.57	0.00	632.57	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,265.15	0.00	1,265.15	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535

Mr Scott Smith				
26/06/2020	493.41	0.00	493.41	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	3,340.00	0.00	3,340.00	

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

# 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes Yes

Claim Tax Free Threshold

#### 3. Pension Details

Pension Account

Scott Smith ABP 1

Pension Type

Account Based

Start Date

1 July 2011

Reversionary Beneficiary

Tomoko Smith

Purchase Price

0.00

Account Balance

478,973.90

Date of Balance

30 June 2019

Tax Free Proportion

13.88%

### Income Stream Requirements

Minimum Pension

11,970.00

Maximum Pension\*

Not Applicable

### **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

11,970.00

### 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 30

/ 2020

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

#### 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

### 3. Pension Details

Pension Account

Scott Smith ABP 2

Pension Type

Account Based

Start Date

1 July 2012

Reversionary Beneficiary

Tomoko Smith

Purchase Price

0.00

Account Balance

191,006.65

7 1000ant Dalanoc

131,000.03

Date of Balance

30 June 2019

Tax Free Proportion

80.44%

# Income Stream Requirements

Minimum Pension

4,780.00

Maximum Pension\*

Not Applicable

# **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

4,780.00

# 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

30

06

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name Leighton Kesteven Superannuation Fund No 1

Fund ABN 24 197 634 204 Fund Address PO Box 31

GORDON, NSW 2072

### 2. Member Details

Member's Name Mr Scott Smith

Date of Birth 6 December 1953

Gender Male
Tax File Number Held Yes
Claim Tax Free Threshold Yes

### 3. Pension Details

Pension Account Scott Smith ABP 3

Pension Type Account Based
Start Date 1 July 2013

Reversionary Beneficiary Tomoko Smith

Purchase Price 0.00

Account Balance 142,732.04

Date of Balance 30 June 2019

Tax Free Proportion 100.00%

# **Income Stream Requirements**

Minimum Pension 3,570.00

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 3,570.00

# 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 \_\_\_\_\_30 \_ / \_\_\_06 \_ / \_\_\_\_\_2020

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

# 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

#### 3. Pension Details

Pension Account

Scott Smith ABP 4

Pension Type

Account Based

Start Date

1 July 2014

Reversionary Beneficiary

Tomoko Smith

Purchase Price

0.00

Account Balance

41,538.51

Date of Balance

30 June 2019

Tax Free Proportion

19.64%

# Income Stream Requirements

Minimum Pension

1.040.00

Maximum Pension\*

Not Applicable

# **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

1,040.00

# 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

30

06

<sup>\*</sup> 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.

### 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

#### 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

#### 3. Pension Details

Pension Account

Scott Smith ABP 5

Pension Type

Account Based

Start Date

6 November 2014

Reversionary Beneficiary

Tomoko Smith

Purchase Price

0.00

Account Balance

195,526,12

Date of Balance

30 June 2019

Tax Free Proportion

2.91%

#### Income Stream Requirements

Minimum Pension

4,890.00

Maximum Pension\*

Not Applicable

# **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Net

Selected Amount

5,090.00

# 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

r

30

06

, 2020

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

### 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

# 3. Pension Details

Pension Account

Scott Smith ABP 6

Pension Type

Account Based

Start Date

1 July 2016

Reversionary Beneficiary

Tomoko Smith

Purchase Price

0.00

Account Balance

56,604.91

Date of Balance

30 June 2019

Tax Free Proportion

11.82%

### **Income Stream Requirements**

Minimum Pension

1.420.00

Maximum Pension\*

Not Applicable

# **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

1,420.00

# 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

- X

Date

30

06

<sup>\*</sup> 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.

### 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

# 2. Member Details

Member's Name

Mr Scott Smith

Date of Birth

6 December 1953

Gender

Male

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

### 3. Pension Details

Pension Account

Scott Smith ABP 7

Pension Type

Account Based

Start Date

1 July 2019

Reversionary Beneficiary

Tomoko Smith

Purchase Price

133,518.59

Account Balance

133,518.59

Date of Balance

30 June 2019

Tax Free Proportion

53,16%

# Income Stream Requirements

Minimum Pension

3,340.00

Maximum Pension\*

Not Applicable

### **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

3.340.00

# 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

30

06

/ 20

<sup>\*</sup> 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.

# **Mrs Tomoko Smith**

# **YTD Summaries**

TTD Guillilaries	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Tomoko Smith ABP 1	10,320.00	OK!	10,320.00	OK!	10,320.00	41,275.25	51,595.25	14.11%
Tomoko Smith ABP 2	3,870.00	OK!	3,870.00	OK!	3,870.00	15,490.62	19,360.62	79.22%
Tomoko Smith ABP 3	3,090.00	OK!	3,090.00	OK!	3,090.00	12,353.29	15,443.29	92.22%
Tomoko Smith ABP 4	670.00	OK!	670.00	OK!	670.00	2,662.13	3,332.13	22.76%
Tomoko Smith ABP 5	1,070.00	OK!	1,070.00	OK!	1,070.00	4,297.84	5,367.84	13.89%
Tomoko Smith ABP 6	2,770.00	OK!	2,770.00	OK!	2,770.00	11,067.49	13,837.49	51.29%
Totals								
Gross Drawdowns PAYG Tax Net Drawdowns	21,790.00 0.00 21,790.00	0.00 0.00 0.00	21,790.00 0.00 21,790.00	0.00 0.00 0.00	21,790.00 0.00 21,790.00			

#### Footnotes

<sup>\*</sup>The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

# **Mrs Tomoko Smith**

Pension Payments				
Tomoko Smith ABP 1				
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	977.27	0.00	977.27	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	1,954.55	0.00	1,954.55	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	1,954.54	0.00	1,954.54	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	3,909.09	0.00	3,909.09	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	1,524.55	0.00	1,524.55	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	10,320.00	0.00	10,320.00	
Tomoko Smith ABP 2				
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	366.48	0.00	366.48	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	732.95	0.00	732.95	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	732.96	0.00	732.96	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,465.91	0.00	1,465.91	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	571.70	0.00	571.70	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	3,870.00	0.00	3,870.00	
Tomoko Smith ABP 3				
Date	<b>Gross Amount</b>	PAYG	Net Amount	Description
29/01/2020	292.61	0.00	292.61	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	585.23	0.00	585.23	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	585.23	0.00	585.23	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,170.45	0.00	1,170.45	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	456.48	0.00	456.48	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	3,090.00	0.00	3,090.00	
Tomoko Smith ABP 4				
Date	Gross Amount	PAYG	Net Amount	Description
29/01/2020	63.45	0.00	63.45	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	126.89	0.00	126.89	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	126.89	0.00	126.89	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	253.79	0.00	253.79	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	98.98	0.00	98.98	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	670.00	0.00	670.00	
Tomoko Smith ABP 5				
Date	Gross Amount	PAYG		Description
29/01/2020	101.33	0.00	101.33	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	202.65	0.00	202.65	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	202.65	0.00	202.65	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	405.30	0.00	405.30	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	158.07	0.00	158.07	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	1,070.00	0.00	1,070.00	
Tomoko Smith ABP 6				
Date	Gross Amount	PAYG		Description
29/01/2020	262.31	0.00	262.31	part of \$5,000.00 INTERNET TRANSFER INTERNET TRAN
22/06/2020	524.61	0.00	524.61	part of \$10,000.00 INTERNET TRANSFER ONLINE V98597
23/06/2020	524.65	0.00	524.65	part of \$10,000.00 INTERNET TRANSFER ONLINE V69609
24/06/2020	1,049.25	0.00	1,049.25	part of \$20,000.00 INTERNET TRANSFER ONLINE B62535
26/06/2020	409.18	0.00	409.18	part of \$8,000.00 INTERNET TRANSFER ONLINE J023798
Totals:	2,770.00	0.00	2,770.00	

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

## 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

# 3. Pension Details

Pension Account

Tomoko Smith ABP 1

Pension Type

Account Based

Start Date

1 July 2011

Reversionary Beneficiary

Scott Smith

Purchase Price

0.00

Account Balance

515,952:50

Date of Balance

30 June 2019

Tax Free Proportion

14.11%

### **Income Stream Requirements**

Minimum Pension

10,320.00

Maximum Pension\*

51,595.25

## **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

10,320.00

# 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.

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

### 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes

rax rile Number nelo

Yes Yes

Claim Tax Free Threshold

#### 3. Pension Details

Pension Account

Tomoko Smith ABP 2

Pension Type

Account Based

Start Date

1 July 2012

Reversionary Beneficiary

•

Purchase Price

Scott Smith

0.00

Account Balance

193,606.21

Date of Balance

30 June 2019

Tax Free Proportion

79.22%

# **Income Stream Requirements**

Minimum Pension

3,870.00

Maximum Pension\*

19,360.62

# Pension Payment Details

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

3,870.00

# 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 30 , 06 , 2020

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

# 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes Yes

Claim Tax Free Threshold

# 3. Pension Details

Pension Account

Tomoko Smith ABP 3

Pension Type

Account Based

Start Date

1 July 2013

Reversionary Beneficiary

Scott Smith

Purchase Price

0.00

Account Balance

154,432.93

Date of Balance

30 June 2019

Tax Free Proportion

92.22%

# Income Stream Requirements

Minimum Pension

3,090.00

Maximum Pension\*

15,443.29

### **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

3,090.00

# 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 30 / 06 / 2020

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

# 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

### 3. Pension Details

Pension Account

Tomoko Smith ABP 4

Pension Type

**Account Based** 

Start Date

1 July 2014

Reversionary Beneficiary

Scott Smith

Purchase Price

0.00

Account Balance

33,321.33

Date of Balance

30 June 2019

Tax Free Proportion

22.76%

# **Income Stream Requirements**

Minimum Pension

670.00

Maximum Pension\*

3,332.13

\* 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

670.00

### 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 \_\_\_\_\_\_ Date \_\_\_\_\_\_ 06 / 2020

### 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

**Fund Address** 

PO Box 31

GORDON, NSW 2072

### 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

#### 3. Pension Details

Pension Account

Tomoko Smith ABP 5

Pension Type

Account Based

Start Date

1 July 2016

Reversionary Beneficiary

Scott Smith

Purchase Price

0.00

Account Balance

53,678,41

Date of Balance

30 June 2019

Tax Free Proportion

13.89%

### Income Stream Requirements

Minimum Pension

1,070.00

Maximum Pension\*

5,367.84

### **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

1,070.00

### 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

Mmn

Date

30

06

<sup>\*</sup> 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.

# 1. Fund Details

Fund Name

Leighton Kesteven Superannuation Fund No 1

Fund ABN

24 197 634 204

Fund Address

PO Box 31

GORDON, NSW 2072

### 2. Member Details

Member's Name

Mrs Tomoko Smith

Date of Birth

27 February 1955

Gender

Female

Tax File Number Held

Yes

Claim Tax Free Threshold

Yes

### 3. Pension Details

Pension Account

Tomoko Smith ABP 6

Pension Type

Account Based

Start Date

1 July 2019

Reversionary Beneficiary

Scott Smith

Purchase Price

138,374.88

Account Balance

138,374.88

Date of Balance

30 June 2019

Tax Free Proportion

51.29%

# Income Stream Requirements

Minimum Pension

2,770.00

Maximum Pension\*

13,837.49

### **Pension Payment Details**

Payment Frequency

Yearly

Selected Amount Strategy

Minimum

Selected Amount

2,770.00

# 4. Member Declarati<u>on</u>

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 \_\_\_\_\_30 \_ / \_06 \_ / \_2020

<sup>\*</sup> 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.