

Asteron Life Complete Superannuation Statement



036986 052



Mr Jamie Moxham
56 Chesteron Road
BASSENDEAN WA 6054

239/001

30 August 2021

Dear Mr Moxham

Your Life Insurance Annual Statement.

Taking out life insurance could be one of the most valuable decisions you can make for your family. This annual statement confirms your level of cover and contributions you've made over the last financial year. Please note that if we refunded any excess premium payments during the year, they have not been included in the total insurance premium contribution amount(s) shown on this statement.

You could be eligible for a tax deduction.

From 1 July 2017, most people under 75 years old can claim a tax deduction for personal super contributions subject to concessional contributions cap limits. Additional work tests apply if you are under 18 or aged between 67-75 years of age.

It is worth discussing the details with your registered tax agent or registered financial adviser first.

To make a claim, just complete the enclosed 'Notice of intent to claim or vary a deduction for personal super contributions form', and return it to Asteron Life, GPO Box 68, Sydney NSW 2001

Life changes.

When your circumstances change, it makes sense to revisit your level and type of life insurance cover. So if you've recently changed job, had a child, married or divorced, or bought a new house, get in touch with your financial adviser to discuss your options.

Annual Report

Your Superannuation Annual Report is available online at www.asteronlife.com.au/investments-and-superannuation from October. Alternatively, you may elect to have a hard copy of the annual report sent to you at no additional charge.

This information is general advice only, and doesn't take into account your objectives, financial situation or needs. You should refer to your Product Disclosure Statement (PDS) and obtain financial advice before making any decision about this product. This product is not a bank deposit or other bank liability. Products and services are provided by different entities in the Suncorp Group and each entity is not responsible for, does not guarantee and is not liable in any respect for products or services of other Suncorp Group entities.

Issued by Suncorp Portfolio Services Limited ABN 61 063 427 958 AFSL 237905 RSE L0002059 as Trustee for Suncorp Master Trust ABN 98 350 952 022 RSE R1056655
Insurer - Asteron Life & Superannuation Limited ABN 87 073 979 530 AFSL 229880

Asteron is part of the TAL Dai-ichi Life Australia Pty Limited ABN 97 150 070 483 (TAL) group of companies. Suncorp Portfolio Services Limited (SPSL) is not part of the TAL group of companies. The obligations of the TAL group of companies and Suncorp Group companies are not guaranteed by each other. SPSL uses the Asteron Life brand under licence from the TAL group of companies.

Customer Service GPO Box 68, Sydney NSW 2001
Ph: 1800 221 727 or 02 8275 3999 8am to 6pm AEST
Fax: 1300 766 833 Email: life_customerservice@asteronlife.com.au
Web: www.asteronlife.com.au

Policy Number/Linked Policy

E3016958/E3016959

Cover
Life

Insured Person/Member
Mr Jamie Peter Moxham

Important Dates
- Policy anniversary
16 October each year
- Policy commencement
16/10/2012

Class of Business
Superannuation

Fund
Suncorp Portfolio Services
Limited as Trustee for
Suncorp Master Trust

Statement Period
01/07/2020 to 30/06/2021

Non-concessional Contributions
Member - \$2,795.82
Concessional Contributions
\$0.00

Your Adviser
Mr Stuart Howes
08 6189 2665

Customer Service

1800 221 727 or
02 8275 3999 8am-6pm (AEST)

Internet

www.asteronlife.com.au

► See your Policy Benefits
and Features over

Any questions?

We want to make sure you're comfortable with your policy and the benefits it provides you and your family. So feel free to give us a call on 1800 221 727. We'll be happy to help.

Yours sincerely
Asteron Life Customer Service

Asteron Life Complete
Superannuation Statement



Policy Number

E3016958

Benefits and Features

<ul style="list-style-type: none">• Stepped Premium• Guaranteed Future Insurability	<ul style="list-style-type: none">• Flexible Policy Linking
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Optional Benefits

<input checked="" type="checkbox"/>	Healthy Life Option		
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Benefit Table

	Sum Insured
Life Cover	\$3,190,703

Insurance Premiums

Insurance premiums of \$2795.82 have been paid from your account through contributions or rollovers.

Explanation of Terms

Concessional Contributions

Concessional contributions include, for example, the following contributions:

- Superannuation Guarantee
- salary sacrifice and
- personal contributions for which you have claimed a tax deduction

Non-concessional Contributions

These are after tax contributions and include personal contributions for which a tax deduction has not been claimed.

We welcome your comments

We are happy to provide you with any information you require to understand your entitlements, so please give us a call if you require additional assistance.

If you have any feedback - we'd like to hear from you. If something goes wrong, let us know so that we can try to help you. Our contact details are on the front page of your statement.

If you do need to make a complaint, we will try and resolve it to your satisfaction as quickly as possible. Please phone or write to us at the address below:

Mail: Manager, Life Customer Service
 Asteron
 GPO Box 68
 Sydney NSW 2001
Email: life_customerservice@asteronlife.com.au
Phone: 1800 221 727 or 02 8275 3999 (8am to 6pm AEST, Monday to Friday)

Notice of intent to claim or vary a deduction for personal contributions form

Financial Year ending 30 June 2021

Policy Number: E3016958
Member Name: Mr Jamie Peter Moxham
Address: 56 Chesteron Road
BASSENDEAN WA 6054
Fund Name: Suncorp Master Trust
Fund ABN: 98 350 952 022



If you intend to claim a tax deduction for the personal super contributions you've made during the 2020 – 2021 financial year, you'll need to complete this form and return it to the address below before you lodge your tax return or 30 June 2022, whichever is earlier.

For it to be valid, the Trustee must acknowledge receipt of your original form. So we'll write to you to confirm we have received it.

This is a notice to the Trustee under section 290-170 of the Income Tax Assessment Act 1997.

My personal contributions to the fund in the financial year ended 30 June 2021 were \$ _____

The amount that I will claim as a tax deduction for the year ended 30 June 2021 is \$ _____

Is this varying an earlier Notice of intent to claim or vary a deduction for personal contributions form? (tick box if yes)

- o Where this is a variation:
 - o the Australian Tax Office has disallowed my claim for a deduction for the relevant year (this notice reduces the amount stated in my previous notice by the amount that has been disallowed), or
 - o I wish to vary my previous notice by reducing the amount I advised in my previous notice.
- o I am lodging this notice before the earlier of the following dates:
 - o the day that I lodged my income tax return for the financial year stated on this form, and
 - o 30 June 2022.
- o At the time of completing this notice:
 - o I intend to claim the amount of personal contributions shown above as a tax deduction.
 - o I am a member of the Suncorp Master Trust.
 - o Suncorp Master Trust still holds these contributions.
 - o Suncorp Master Trust has not begun to pay a superannuation income stream based in whole or part on these contributions.
 - o Unless indicated above that this is a variation, I have not included these contributions in an earlier Notice of intent to claim or vary a deduction for personal contributions form.
 - o I have not submitted a contribution splitting application in respect of these contributions.
 - o I have not made any false or misleading statements in the completion of this form.
- o I note that this notice cannot be withdrawn or revoked.

Signature of Member Date / /

Contact Numbers Hm () Wk () Mob ()

Email

For further instructions on completing this form, please refer to ATO website:
<https://www.ato.gov.au/forms/>.

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Insurer - Asteron Life & Superannuation Limited ABN 87 073 979 530 AFSL 229880

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Web: www.asteronlife.com.au

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Important Information

- **Notification of the transfer of the life insurance business of Asteron Life and Superannuation Limited (ALSL) to TAL Life Limited (TAL Life)**

Suncorp Life Holdings Limited ABN 87 064 490 795 (**Suncorp Holdings**) completed the sale of Asteron Life & Superannuation Limited (**Asteron Life**) to TAL Dai-ichi Life Australia Pty Limited (**TAL Group**) on 28 February 2019.

TAL Life Limited ABN 70 050 109 450 (**TAL Life**) and Asteron Life are making an application, under Part 9 of the Life Insurance Act 1995, (the "**Life Act**"), to the Federal Court of Australia (the "**Federal Court**") to transfer the life insurance business of Asteron Life to TAL Life (referred to as a "**Scheme**").

If confirmed, the proposed Scheme will transfer the assets and liabilities of Asteron Life's life insurance business including all of the life insurance policies issued by Asteron Life, to TAL Life. TAL Life will become the issuer of Asteron Life's life insurance policies on and from 1 October 2021.

The application for the confirmation of the proposed Scheme is scheduled to be heard by the Federal Court on 10 September 2021. The Scheme is proposed to take effect on 1 October 2021.

The proposed Scheme will not change how you do business with us or the terms and conditions of your insurance cover through your super. Asteron Life's policy owners and lives insured will automatically become TAL Life's policy owners and lives insured.

If you have any questions about the change to TAL Life, please call our Customer Service Team on 1800 221 727 from 8am to 6pm (AEST) weekdays.

Issued by Suncorp Portfolio Services Limited (SPSL) ABN 61 063 427 958 AFSL 237905 RSE licence no L0002059 as trustee for Suncorp Master Trust (SMT) RSE Fund Registration No. R1056655 ABN 98 350 952 022.

Asteron Life Complete Superannuation Statement



036985 052



Mrs Larelle Moxham
56 Chesterton Road
BASSENDEAN WA 6054

23/9/2022

30 August 2021

Dear Mrs Moxham

Your Life Insurance Annual Statement.

Taking out life insurance could be one of the most valuable decisions you can make for your family. This annual statement confirms your level of cover and contributions you've made over the last financial year. Please note that if we refunded any excess premium payments during the year, they have not been included in the total insurance premium contribution amount(s) shown on this statement.

You could be eligible for a tax deduction.

From 1 July 2017, most people under 75 years old can claim a tax deduction for personal super contributions subject to concessional contributions cap limits. Additional work tests apply if you are under 18 or aged between 67-75 years of age.

It is worth discussing the details with your registered tax agent or registered financial adviser first.

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Life changes.

When your circumstances change, it makes sense to revisit your level and type of life insurance cover. So if you've recently changed job, had a child, married or divorced, or bought a new house, get in touch with your financial adviser to discuss your options.

Annual Report

Your Superannuation Annual Report is available online at www.asteronlife.com.au/investments-and-superannuation from October. Alternatively, you may elect to have a hard copy of the annual report sent to you at no additional charge.

Policy Number/Linked Policy

E3016951/E3016952

Cover
Life

Insured Person/Member
Mrs Larelle Moxham

Important Dates
- Policy anniversary
16 October each year
- Policy commencement
16/10/2012

Class of Business
Superannuation

Fund
Suncorp Portfolio Services
Limited as Trustee for
Suncorp Master Trust

Statement Period
01/07/2020 to 30/06/2021

Non-concessional Contributions
Member - \$1,854.96
Concessional Contributions
\$0.00

Your Adviser
Mr Stuart Howes
08 6189 2665

Customer Service

1800 221 727 or
02 8275 3999 8am-6pm (AEST)

Internet

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► See your Policy Benefits
and Features over

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Insurer - Asteron Life & Superannuation Limited ABN 87 073 979 530 AFSL 229880

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Any questions?

We want to make sure you're comfortable with your policy and the benefits it provides you and your family. So feel free to give us a call on 1800 221 727. We'll be happy to help.

Yours sincerely
Asteron Life Customer Service

Asteron Life Complete
Superannuation Statement



Policy Number

E3016951

Benefits and Features

<ul style="list-style-type: none">• Stepped Premium• Guaranteed Future Insurability	<ul style="list-style-type: none">• Flexible Policy Linking
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Optional Benefits

<input checked="" type="checkbox"/>	Healthy Life Option		
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Benefit Table

Sum Insured

Life Cover	\$3,190,703
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Insurance Premiums

Insurance premiums of \$1854.96 have been paid from your account through contributions or rollovers.

Explanation of Terms

Concessional Contributions

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We welcome your comments

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Notice of intent to claim or vary a deduction for personal contributions form

Financial Year ending 30 June 2021



Policy Number: E3016951
Member Name: Mrs Larelle Moxham
Address: 56 Chesterton Road
BASSENDEAN WA 6054
Fund Name: Suncorp Master Trust
Fund ABN: 98 350 952 022

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