**PETKAT SUPER FUND**

**CENTRELINK / DVA SCHEDULE**

Depending on your individual circumstances, it may be necessary for you to provide this schedule to your local Centrelink or Department of Veterans' Affairs (DVA) office to work out your benefit entitlement. Please contact your Centrelink or DVA office for details.

**Provider Details**

|  |  |
| --- | --- |
| Provider Name | PETKAT SUPER FUND |
| Provider ABN | 21597640184 |
| Provider Address | PO Box 1777, Wollongong Dc, New South Wales, 2500 |
| Provider Contact Name | Blue Chip Super |
| Provider Contact Phone Number | 1300975999 |

**Product Details**

|  |  |
| --- | --- |
| Client Name | KATHLEEN WILSON |
| Product Name | SMSF Pension |
| Product Reference Number | 503 |
| Type of Income Stream | Allocated |
| Has this income stream been split as part of a property settlement on marriage breakdown ? | No |
| Is this Income stream paid from a SMSF or SAF ? | Yes |
| Does the income stream meet all of the characteristics required under section 9A, 9B or 9BA of the Social Security Act 1991 OR section 5JA, 5JB or 5JBA of the Veterans' Entitlements Act 1986 to qualify as asset test example income stream ? | No |
| Is the income stream eligible to retain asset test exempt status ? | No |
| Commencement Date / Purchase Date | 26/03/2013 |
| Relevant Number (at commencement date) | N/A |
| Tax Free Proportion | 81.82% |
| Reversionary beneficiary nominated | No |
| Original Purchase Price | $249,183 |
| Commutations | No |
| Gross Annual Payment | $12,000.00 |
| Account Balance at 1 July | $187,955.33 |
| Current Account Balance | $181,446.29 |
| Date of Current Account Balance | 30/06/2023 |

TRUSTEE SIGNATURE .................................................................. Date: / /

**PETKAT SUPER FUND**

**CENTRELINK / DVA SCHEDULE**

Depending on your individual circumstances, it may be necessary for you to provide this schedule to your local Centrelink or Department of Veterans' Affairs (DVA) office to work out your benefit entitlement. Please contact your Centrelink or DVA office for details.

**Provider Details**

|  |  |
| --- | --- |
| Provider Name | PETKAT SUPER FUND |
| Provider ABN | 21597640184 |
| Provider Address | PO Box 1777, Wollongong Dc, New South Wales, 2500 |
| Provider Contact Name | Blue Chip Super |
| Provider Contact Phone Number | 1300975999 |

**Product Details**

|  |  |
| --- | --- |
| Client Name | PETER GRANT |
| Product Name | SMSF Pension |
| Product Reference Number | 504 |
| Type of Income Stream | Allocated |
| Has this income stream been split as part of a property settlement on marriage breakdown ? | No |
| Is this Income stream paid from a SMSF or SAF ? | Yes |
| Does the income stream meet all of the characteristics required under section 9A, 9B or 9BA of the Social Security Act 1991 OR section 5JA, 5JB or 5JBA of the Veterans' Entitlements Act 1986 to qualify as asset test example income stream ? | No |
| Is the income stream eligible to retain asset test exempt status ? | No |
| Commencement Date / Purchase Date | 26/02/2015 |
| Relevant Number (at commencement date) | N/A |
| Tax Free Proportion | 98.94% |
| Reversionary beneficiary nominated | No |
| Original Purchase Price | $154,521 |
| Commutations | No |
| Gross Annual Payment | $7,500.00 |
| Account Balance at 1 July | $111,159.61 |
| Current Account Balance | $106,901.44 |
| Date of Current Account Balance | 30/06/2023 |

TRUSTEE SIGNATURE .................................................................. Date: / /

**PETKAT SUPER FUND**

**CENTRELINK / DVA SCHEDULE**

Depending on your individual circumstances, it may be necessary for you to provide this schedule to your local Centrelink or Department of Veterans' Affairs (DVA) office to work out your benefit entitlement. Please contact your Centrelink or DVA office for details.

**Provider Details**

|  |  |
| --- | --- |
| Provider Name | PETKAT SUPER FUND |
| Provider ABN | 21597640184 |
| Provider Address | PO Box 1777, Wollongong Dc, New South Wales, 2500 |
| Provider Contact Name | Blue Chip Super |
| Provider Contact Phone Number | 1300975999 |

**Product Details**

|  |  |
| --- | --- |
| Client Name | KATHLEEN WILSON |
| Product Name | SMSF Pension |
| Product Reference Number | 505 |
| Type of Income Stream | Allocated |
| Has this income stream been split as part of a property settlement on marriage breakdown ? | No |
| Is this Income stream paid from a SMSF or SAF ? | Yes |
| Does the income stream meet all of the characteristics required under section 9A, 9B or 9BA of the Social Security Act 1991 OR section 5JA, 5JB or 5JBA of the Veterans' Entitlements Act 1986 to qualify as asset test example income stream ? | No |
| Is the income stream eligible to retain asset test exempt status ? | No |
| Commencement Date / Purchase Date | 26/02/2015 |
| Relevant Number (at commencement date) | N/A |
| Tax Free Proportion | 97.68% |
| Reversionary beneficiary nominated | No |
| Original Purchase Price | $157,101 |
| Commutations | No |
| Gross Annual Payment | $10,500.00 |
| Account Balance at 1 July | $104,257.57 |
| Current Account Balance | $96,745.07 |
| Date of Current Account Balance | 30/06/2023 |

TRUSTEE SIGNATURE .................................................................. Date: / /