

# HADDLETON SUPERANNUATION FUND

## PENSIONS CALCULATION SUMMARY REPORT AT 14/01/2014

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Member Name	<b>Haddleton, Peter Clifford</b>
Member Account	501
Member DOB	30/11/1953
Pension Start Date	01/07/2009
Age at Start Date	55

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### Balance Details at 01/07/2009

Taxable	1,900.00
Tax Free	100.00
Total Benefit	2,000.00
Tax-Free Proportion	5.00%

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**Pension Calculation Year** **2013**

**Age at 01/07/2012** **58**

**Below Calculations are based on Account Balance at 01/07/2012 of 54,476.51**

### Pension Type **Minimum Account-Based**

Minimum Payment Factor	3.00% (includes 25% reduction)
Maximum Payment Factor	N/A
Minimum Payment	1,630.00
Maximum Payment	54,476.51
Deductible Amount	100.00

<b>Pension Payable</b>	<b>Year 4</b>	<b>Annual</b>
Pension Amount	2,000.00	2,000.00
Tax Free Component	100.00	100.00
Taxable Component	1,900.00	1,900.00
Gross Tax	0.00	0.00
Rebate	285.00	285.00
Tax Payable	0.00	0.00
Net Pension	2,000.00	2,000.00
Net Monthly Pension		166.67
Quarterly PAYG Remittance		0.00

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**HADDLETON SUPERANNUATION FUND**  
**MINUTES OF A MEETING OF THE TRUSTEE(S) HELD ON 14/01/2014**  
**AT**

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PRESENT

PETER CLIFFORD HADDLETON

PENSION COMMENCEMENT

Peter Clifford Haddleton

wishes to commence a new

Minimum Account-Based pension with a commencement date of 01/07/2009

The Pension Account Balance used to support this pension will be \$54,476.51, consisting of:

- a Taxable amount of: \$1,900.00
- and a Tax Free amount of: \$100.00

TRUSTEE ACKNOWLEDGMENT

It was resolved that Trustee(s) have agreed to this and has taken action to ensure the following:

- The member's minimum pension payments are to be made at least annually
- An amount or percentage of the pension will not be prescribed as being left-over when the pension ceases
- The pension can be transferred only on the death of the pensioner to one of their dependants or cashed as a lump sum to the pensioner's estate.
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The fund's trust deed provides for payment of this pension to the member.
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount each year.

REVERSIONARY

It was resolved that the pension will not be reversionary.

PAYMENT

It was resolved that the trustees have agreed to pay the pension payment for the year ended 30 June 2013 of

\$2,000.00 in the frequency of at least an annual payment.

CLOSURE

Signed by the trustee(s) pursuant to the Fund Deed.

..... /...../.....  
Peter Clifford Haddleton

Dear Sir/Madam

RE: Minimum Account-Based pension

I Peter Clifford Haddleton am currently a member of HADDLETON SUPERANNUATION FUND  
I hereby request the trustee(s) to commence a

Minimum Account-Based pension with a commencement date of 01/07/2009 with \$54,476.51  
of the superannuation benefits standing to my member's account in the fund. This balance contains a Taxable Balance of  
\$1900.00

and a Tax Free Balance of

\$100.00

I have reached my preservation age and have currently satisfied a condition of release under the SIS Act. Set out below the  
required amount and the frequency of the payment for the year ended 30 June 2013

Pension Amount: \$ 2000.00 in the frequency of at least an annual payment.

The Pension will have no Reversionary Beneficiaries.

Should you have any queries please do not hesitate to contact me.

Yours Sincerely,

.....

Peter Clifford Haddleton  
DATED:     /     /

# PAYG Payment Summary - Superannuation Income Stream

Payment summary for year ending 30 June 2013

**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

HADDLETON

Payee's given name(s)

PETER CLIFFORD

Payee's address

5 BORONIA PLACE

BUNBURY WA 6230

Date of birth

30/11/1953

**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](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61

Period of payment 01/07/2012 to 30/06/2013

Payee's Tax File Number

624768185

Total Tax withheld

\$

## Taxable component

Taxed element

\$

1,900

Untaxed element

\$

Tax free component

\$

100

Tax offset amount

\$

285

Lump sum in arrears - taxable component

\$

Lump sum in arrears - Tax free component

\$

## Payer Details

Payer's ABN or Withholder Payer Number

81452282141

Branch Number

Payer's Name

HADDLETON SUPERANNUATION FUND

Signature of authorised person

Date

/ /

**HADDLETON SUPERANNUATION FUND**  
**MINUTES OF A MEETING OF THE TRUSTEE(S) HELD ON 14/01/2014**  
**AT**

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PRESENT

PETER CLIFFORD HADDLETON

PENSION CONTINUATION

Peter Clifford Haddleton

wishes to continue existing Minimum Account-Based pension with a commencement date of 01/07/2009

The Pension Account Balance as at 01/07/2012 is \$54,476.51, consisting of:

- a Taxable component of: \$51,752.68
- and a Tax Free component of: \$2,723.83

TRUSTEE ACKNOWLEDGMENT

It was resolved that Trustee(s) have agreed to this and have taken action to ensure the following:

- The member's minimum annual pension payment requirement is met
- The Trustee(s) will comply with ATO obligations such as PAYG withholding and payment summary obligations
- The Trustee(s) will notify the member, in writing, of their pension amount and assessable amount.

PAYMENT

It was resolved that the trustees have agreed to pay the pension payment for the year ended 30 June 2013 of

\$2,000.00 in the frequency of at least an annual payment.

CLOSURE

Signed by the trustee(s) pursuant to the Fund Deed.

..... /...../.....  
Peter Clifford Haddleton

Peter Clifford Haddleton  
5 Boronia Place  
Bunbury  
WA, 6230

Dear Peter Clifford,

**Re: Account Based Pension**

We have recently completed a review of the assets of HADDLETON SUPERANNUATION FUND and your account based pension account in the Fund as at 30 June 2012.

Based on the account balance and the legislative requirements for account based pensions, I have set out below the Minimum income stream which must be taken for the year ending 30 June 2013.

Your Account Based Pension account - \$54,476.51

Your Age at the beginning of the year - 58

Your Minimum income stream applicable - \$1,630.00

The income stream taken will consist of:

- Taxable component - 95.00%
- Tax Free component - 5.00%

You have a choice as to the annual income stream you are to take, between the minimum and your remaining account balance as outlined above.

Should you have any queries please do not hesitate to contact me.

Yours Sincerely,

.....  
Peter Clifford Haddleton

DATED:     /     /