

NETPHREY SUPER
Pension Withdrawal Limits
For the Period 1 July 2020 to 30 June 2021

Mr Michael Oxenham

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Tax Free Pension (Pre 1 Jan 2015)	2,100.00	OK!	2,100.00	OK!	2,100.00	0.00	0.00	100.00%

Totals

Gross Drawdowns	2,100.00	0.00	2,100.00	0.00	2,100.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	2,100.00	0.00	2,100.00	0.00	2,100.00			

Footnotes:

*The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

Pension Payments

Tax Free Pension (Pre 1 Jan 2015)

Date	Gross Amount	PAYG	Net Amount	Description
12/04/2021	1,100.00	0.00	1,100.00	Benefit to MHO Transfer to xx2599
14/04/2021	1,000.00	0.00	1,000.00	Benefit to MHO Transfer to xx2599
Totals:	2,100.00	0.00	2,100.00	

Any descriptions with member initials gets allocated to them, and anything over the minimum pension, is a lump sum (see F2a).

NETPHREY SUPER
Pension Withdrawal Limits
For the Period 1 July 2020 to 30 June 2021

Ms Jeanette Oxenham

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
Tax Free Pension (Pre 1 Jan 2015)	5,560.00	OK!	5,560.00	OK!	5,560.00	0.00	0.00	99.89%

Totals

Gross Drawdowns	5,560.00	0.00	5,560.00	0.00	5,560.00
PAYG Tax	0.00	0.00	0.00	0.00	0.00
Net Drawdowns	5,560.00	0.00	5,560.00	0.00	5,560.00

Footnotes:

*The plan amount is the annual pension review amount or the minimum amount where no review amount is recorded.

Pension Payments

Tax Free Pension (Pre 1 Jan 2015)

Date	Gross Amount	PAYG	Net Amount	Description
07/09/2020	2,000.00	0.00	2,000.00	Benchtop Transfer to xx2599 - PTO
09/09/2020	1,008.00	0.00	1,008.00	Benefit to JSO Transfer to xx2599
24/09/2020	2,000.00	0.00	2,000.00	Benefit to JSO Transfer to xx2599
22/10/2020	552.00	0.00	552.00	part of \$6,000.00 Benefit to JSO Transfer to xx2599
Totals:	5,560.00	0.00	5,560.00	

Rachel Green-Luther

From: Michael Oxenham <michael@oxenham.com.au>
Sent: Wednesday, August 25, 2021 4:06 PM
To: Rachel Green-Luther
Subject: Re: MH&JS OXENHAM - 2020/2021FY Quote and Query

The quote is okay Rachel, thanks. Sorry, I forgot to advise you about that little slip up for the benchtop – yes it was a benefit to Jeanette.

Let me know when you're ready and I'll arrange a time to come sign everything and pay the invoice. I think you already have a copy of the power of attorney to enable me to sign on behalf of Jeanette. Regards

Michael

On 25 Aug 2021, at 2:23 pm, Rachel Green-Luther <RachelG@virtusuper.com.au> wrote:

Hi Mike,

Sending well wishes to you and Jeanette.

Thank you for the information. We estimate the fee to complete the super fund 2020/2021 financial statements and tax return to be \$2,375.00 (GST inclusive), including audit.

If you are happy to proceed, please confirm you are happy for the withdrawal on 07/09/2020 for \$2,000.00, with a bank description of "Benchtop Transfer to xx2599", to be considered a withdrawal for Jeanette?

If you have any questions, please feel free to contact me.

Kind regards,
Rach

Rachel Green-Luther CPA
Senior Accountant

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from

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From: Michael Oxenham <michael@oxenham.com.au>
Sent: Monday, August 23, 2021 10:35 PM
To: Rachel Green-Luther <RachelG@virtusuper.com.au>
Subject: MH&JS OXENHAM FINANCIALS

Hi Rachel,

I've done bugger all this year and just looked after my very sick wife. Let me know when you've got them sorted and I'll come see you.