



Osborne Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2021 to 30 June 2022

Mr Bruce Osborne

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
100% Tax Free Pension	3,820.00	OK!	3,820.00	OK!	3,820.00	0.00	0.00	100.00%
100% Taxable Pension	41,180.00	OK!	8,580.00	OK!	8,580.00	0.00	0.00	0.00%
Totals								
Gross Drawdowns	45,000.00	0.00	12,400.00	0.00	12,400.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	45,000.00	0.00	12,400.00	0.00	12,400.00			

Footnotes:

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

Pension Payments

100% Tax Free Pension

Date	Gross Amount	PAYG	Net Amount	Description
02/07/2021	3,071.05	0.00	3,071.05	part of \$10,000.00 Internet trfr TO 8454532, Pay Bruce
12/07/2021	626.11	0.00	626.11	part of \$2,000.00 Internet trfr TO 8454532, Pay Bruce
23/08/2021	122.84	0.00	122.84	part of \$2,000.00 INTEINET TRANSFER DEBIT TO 8454532
Totals:	3,820.00	0.00	3,820.00	

100% Taxable Pension

Date	Gross Amount	PAYG	Net Amount	Description
02/07/2021	6,928.95	0.00	6,928.95	part of \$10,000.00 Internet trfr TO 8454532, Pay Bruce
12/07/2021	1,373.89	0.00	1,373.89	part of \$2,000.00 Internet trfr TO 8454532, Pay Bruce
24/07/2021	2,000.00	0.00	2,000.00	INTERNET TRANSFER DEBIT To 8454532 REFERENCE N
10/08/2021	2,000.00	0.00	2,000.00	INTERNET TRANSFER DEBIT To 8454532 REFERENCE N
15/08/2021	2,000.00	0.00	2,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE N
23/08/2021	1,877.16	0.00	1,877.16	part of \$2,000.00 INTEINET TRANSFER DEBIT TO 8454532
25/08/2021	1,000.00	0.00	1,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE I
30/08/2021	4,000.00	0.00	4,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE I
08/09/2021	1,000.00	0.00	1,000.00	INTERNET TRANSFER DEBIT To 8454532 REFERENCE N
15/09/2021	1,000.00	0.00	1,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE I
22/09/2021	2,000.00	0.00	2,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE I
27/09/2021	1,000.00	0.00	1,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE N
13/04/2022	10,000.00	0.00	10,000.00	INTERNET TRANSFER DEBIT TO 8454532 REFERENCE I
04/05/2022	5,000.00	0.00	5,000.00	INTERNEY TRANSFER DEBIT To 8454532 REFERENCE r
Totals:	41,180.00	0.00	41,180.00	

All withdrawals treated as pension payment

Pension payments Osborne Superannuation Fund 2021 - 2022			
Date	From Account	To Account	Amount
2/07/2021	53347400	845432	\$ 10,000.00
12/07/2021	53347400	845432	\$ 2,000.00
24/07/2021	53347400	845432	\$ 2,000.00
10/08/2021	53347400	845432	\$ 2,000.00
15/08/2021	53347400	845432	\$ 2,000.00
23/08/2021	53347400	845432	\$ 2,000.00
25/08/2021	53347400	845432	\$ 1,000.00
30/08/2021	53347400	845432	\$ 4,000.00
8/09/2021	53347400	845432	\$ 1,000.00
15/09/2021	53347400	845432	\$ 1,000.00
22/09/2021	53347400	845432	\$ 2,000.00
27/09/2021	53347400	845432	\$ 1,000.00
13/04/2022	53347400	845432	\$ 10,000.00
4/05/2022	53347400	845432	\$ 5,000.00
			\$ 45,000.00

Phone notes

Wednesday 22 June 2022 at 10.18 am

Rachel Green Luther (RGL) spoke to Bruce Osborne

Discussed:

- Bruce confirmed he has withdrawn \$45,000 as his withdrawals for 22FY, which is more than the minimum pension requirements.
- Bruce will provide the Suncorp transactions when we do the 22EOFY work
- RGL clarified that Bruce has signed another data feed authorities but due to the change of the name, the suncorp bank account has also changed.