

# Annual Pension Review Statement

## For the Financial Year 2020 / 2021

### 1. Fund Details

Fund Name	Greg Waller Superannuation Fund
Fund ABN	44 898 808 088
Fund Address	17 Wurth Drive BOMBIRA, NSW 2850

### 2. Member Details

Member's Name	Mrs Laurelle Waller
Date of Birth	10 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Laurelle Waller - Pension Account 1
Pension Type	Account Based
Start Date	1 July 2007
Reversionary Beneficiary	Not recorded
Purchase Price	0.00
Account Balance	375,327.45
Date of Balance	30 June 2020
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	9,380.00
Maximum Pension*	Not Applicable

\* Maximum Pension applies only to Transition to Retirement pensions, a limit of 10% of the member's account balance in income that can be drawn each year.

### Pension Payment Details

Payment Frequency	Yearly
Selected Amount Strategy	Minimum
Selected Amount	9,380.00

### 4. Member Declaration

I intend on drawing income from my Account Based account during the 2020 / 2021 financial year in accordance with the above. I understand it is the Trustee's responsibility to ensure that the member draws an income stream in accordance with the relevant legislation.

Signature \_\_\_\_\_ Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_