

SJ & JM Dixon Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2020 to 30 June 2021

Mr Stephen Dixon

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
2016/17 AB Pension Account - 87% Tax Free	34,870.00	OK!	34,870.00	OK!	34,870.00	0.00	0.00	87.02%
2016/17 AB Pension Account - 99.8% Tax Free	4,430.00	OK!	4,430.00	OK!	4,430.00	0.00	0.00	99.81%
Totals								
Gross Drawdowns	39,300.00	0.00	39,300.00	0.00	39,300.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	39,300.00	0.00	39,300.00	0.00	39,300.00			

Footnotes:

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

Pension Payments

2016/17 AB Pension Account - 87%

Date	Gross Amount	PAYG	Net Amount	Description
02/07/2020	3,383.66	0.00	3,383.66	part of \$7,400.00 July Liv Exp Transfer to xx4395
02/08/2020	5,761.36	0.00	5,761.36	part of \$12,600.00 August liv exp Transfer to xx4395
01/09/2020	5,761.36	0.00	5,761.36	part of \$12,600.00 Sep liv exp Transfer to xx4395
01/10/2020	5,761.36	0.00	5,761.36	part of \$12,600.00 Oct liv exp Transfer to xx4395
20/10/2020	306.36	0.00	306.36	part of \$670.00 Amex card Transfer to xx4395
27/10/2020	1,325.35	0.00	1,325.35	part of \$3,000.00 early nov liv exp Transfer to xx439
31/10/2020	4,115.26	0.00	4,115.26	part of \$9,000.00 Nov Liv Exp Transfer to xx4395
30/11/2020	5,601.36	0.00	5,601.36	part of \$12,600.00 Dec 2020 Draw Transfer to xx4395
01/01/2021	2,853.93	0.00	2,853.93	part of \$8,451.00 jan liv exp Transfer to xx4395
Totals:	34,870.00	0.00	34,870.00	

2016/17 AB Pension Account - 99.8

Date	Gross Amount	PAYG	Net Amount	Description
02/07/2020	429.84	0.00	429.84	part of \$7,400.00 July Liv Exp Transfer to xx4395
02/08/2020	731.89	0.00	731.89	part of \$12,600.00 August liv exp Transfer to xx4395
01/09/2020	731.89	0.00	731.89	part of \$12,600.00 Sep liv exp Transfer to xx4395
01/10/2020	731.89	0.00	731.89	part of \$12,600.00 Oct liv exp Transfer to xx4395
20/10/2020	38.92	0.00	38.92	part of \$670.00 Amex card Transfer to xx4395
27/10/2020	168.36	0.00	168.36	part of \$3,000.00 early nov liv exp Transfer to xx439
31/10/2020	522.78	0.00	522.78	part of \$9,000.00 Nov Liv Exp Transfer to xx4395
30/11/2020	711.88	0.00	711.88	part of \$12,600.00 Dec 2020 Draw Transfer to xx4395
01/01/2021	362.55	0.00	362.55	part of \$8,451.00 jan liv exp Transfer to xx4395
Totals:	4,430.00	0.00	4,430.00	

Stephen met minimum pension payments.
Excess taken as lump sum withdrawal as per
documentation on file.

SJ & JM Dixon Superannuation Fund
Pension Withdrawal Limits
For the Period 1 July 2020 to 30 June 2021

Mrs Janet Dixon

YTD Summaries

	Drawdowns to date	Rqd. for Minimum	Minimum	Rqd for Plan	Plan*	Remaining until Max	Maximum	Tax Free %
2016/17 AB Pension Account - 100% Tax Free	37,630.00	OK!	37,630.00	OK!	37,630.00	0.00	0.00	82.70%

Totals

Gross Drawdowns	37,630.00	0.00	37,630.00	0.00	37,630.00			
PAYG Tax	0.00	0.00	0.00	0.00	0.00			
Net Drawdowns	37,630.00	0.00	37,630.00	0.00	37,630.00			

Footnotes:

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

Pension Payments

2016/17 AB Pension Account - 100%

Date	Gross Amount	PAYG	Net Amount	Description
02/07/2020	3,586.50	0.00	3,586.50	part of \$7,400.00 July Liv Exp Transfer to xx4395
02/08/2020	6,106.75	0.00	6,106.75	part of \$12,600.00 August liv exp Transfer to xx4395
01/09/2020	6,106.75	0.00	6,106.75	part of \$12,600.00 Sep liv exp Transfer to xx4395
01/10/2020	6,106.75	0.00	6,106.75	part of \$12,600.00 Oct liv exp Transfer to xx4395
20/10/2020	324.72	0.00	324.72	part of \$670.00 Amex card Transfer to xx4395
27/10/2020	1,506.29	0.00	1,506.29	part of \$3,000.00 early nov liv exp Transfer to xx439
31/10/2020	4,361.96	0.00	4,361.96	part of \$9,000.00 Nov Liv Exp Transfer to xx4395
30/11/2020	6,286.76	0.00	6,286.76	part of \$12,600.00 Dec 2020 Draw Transfer to xx4395
01/01/2021	3,243.52	0.00	3,243.52	part of \$8,451.00 jan liv exp Transfer to xx4395
Totals:	37,630.00	0.00	37,630.00	

Client summary of withdrawals taken.

Payments Drawn						2020-21								
Date	<u>Kharis atf</u> Superfund Amount	Paid to	Date	<u>Kharis atf</u> Superfund Amount	Paid to	Date	<u>Kharis atf</u> Superfund Amount	Paid to	Date	<u>Kharis atf</u> Superfund Amount	Paid to	Date	<u>Kharis atf</u> Westpac Superfund Amount	Paid to
	CBA 8614			Suncorp 75643			ANZ 53499			ANZ 53544			034 070 588917	
2.7.20	\$ 7,400.00	Cba 4395												
2.8.20	\$ 12,600.00	Cba 4395												
1.9.20	\$ 12,600.00	Cba 4395												
1.10.20	\$ 12,600.00	Cba 4395												
20.10.20	\$ 670.00	Cba 4395												
27.10.20	\$ 3,000.00	Cba 4395												
31.10.20	\$ 9,000.00	Cba 4395												
30.11.20	\$ 12,600.00	Cba 4395												
1.1.21	\$ 8,451.00	Cba 4395												
1.2.21	\$ 12,000.00	Cba 4395												
1.3.21	\$ 12,400.00	Cba 4395												
6.4.21	\$ 11,000.00	Cba 4395												
2.5.21	\$ 10,700.00	Cba 4395												
6.6.21	\$ 12,000.00	Cba 4395												
<u>\$137,021.00</u>			<u>\$ -</u>			<u>\$ -</u>			<u>\$ -</u>			<u>\$ -</u>		

\$ 137,021.00

Mini Pension	\$ 39,300.00	Net
	\$ 37,630.00	W
	<u>\$ 76,930.00</u>	
Lump sum	-\$ 60,091.00	