

# Annual Pension Review Statement

## For the Financial Year 2021 / 2022

### 1. Fund Details

Fund Name	Marsh Superannuation Fund
Fund ABN	83 321 688 312
Fund Address	106 Diamond Head Drive Budgewoi, NSW 2262

### 2. Member Details

Member's Name	Mrs Lydia Marsh
Date of Birth	8 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 4
Pension Type	Account Based
Start Date	1 July 2011
Reversionary Beneficiary	Not recorded
Purchase Price	149,108.10
Account Balance	128,800.79
Date of Balance	30 June 2021
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	3,220.00
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	3,220.00

### 4. Member Declaration

I intend on drawing income from my Account Based account during the 2021 / 2022 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 \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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Date of Birth	8 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 8
Pension Type	Account Based
Start Date	1 July 2011
Reversionary Beneficiary	Not recorded
Purchase Price	150,000.00
Account Balance	130,658.79
Date of Balance	30 June 2021
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	3,270.00
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	3,270.00

### 4. Member Declaration

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### 2. Member Details

Member's Name	Mrs Lydia Marsh
Date of Birth	8 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 13
Pension Type	Account Based
Start Date	25 June 2013
Reversionary Beneficiary	Not recorded
Purchase Price	15,746.23
Account Balance	13,163.53
Date of Balance	30 June 2021
Tax Free Proportion	99.94%

### Income Stream Requirements

Minimum Pension	330.00
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	330.00

### 4. Member Declaration

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Fund ABN	83 321 688 312
Fund Address	106 Diamond Head Drive Budgewoi, NSW 2262

### 2. Member Details

Member's Name	Mrs Lydia Marsh
Date of Birth	8 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 15
Pension Type	Account Based
Start Date	6 October 2014
Reversionary Beneficiary	Not recorded
Purchase Price	10,485.45
Account Balance	8,824.28
Date of Balance	30 June 2021
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	220.00
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	220.00

### 4. Member Declaration

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Member's Name	Mrs Lydia Marsh
Date of Birth	8 March 1952
Gender	Female
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 17
Pension Type	Account Based
Start Date	5 December 2019
Reversionary Beneficiary	Not recorded
Purchase Price	75,000.00
Account Balance	73,288.20
Date of Balance	30 June 2021
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	1,830.00
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	1,830.00

### 4. Member Declaration

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