

# 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	Mr Ronald Marsh
Date of Birth	26 December 1948
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 3
Pension Type	Account Based
Start Date	1 July 2011
Reversionary Beneficiary	Not recorded
Purchase Price	184,674.85
Account Balance	80,947.91
Date of Balance	30 June 2021
Tax Free Proportion	81.22%

### Income Stream Requirements

Minimum Pension	2,020.00
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	2,020.00

### 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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### 2. Member Details

Member's Name	Mr Ronald Marsh
Date of Birth	26 December 1948
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 7
Pension Type	Account Based
Start Date	1 July 2011
Reversionary Beneficiary	Not recorded
Purchase Price	148,155.00
Account Balance	111,028.83
Date of Balance	30 June 2021
Tax Free Proportion	92.94%

### Income Stream Requirements

Minimum Pension	2,780.00
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	2,780.00

### 4. Member Declaration

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### 2. Member Details

Member's Name	Mr Ronald Marsh
Date of Birth	26 December 1948
Gender	Male
Tax File Number Held	Yes
Claim Tax Free Threshold	Yes

### 3. Pension Details

Pension Account	Account Based Pension 16
Pension Type	Account Based
Start Date	6 October 2014
Reversionary Beneficiary	Not recorded
Purchase Price	10,000.00
Account Balance	6,951.73
Date of Balance	30 June 2021
Tax Free Proportion	100.00%

### Income Stream Requirements

Minimum Pension	170.00
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	170.00

### 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 \_\_\_\_ / \_\_\_\_ / \_\_\_\_