

Transition to Retirement Income Stream Answer Summary

As at 6 June 2019

Fund Details

Fund name	Hope Superannuation Fund
Meeting Address of the Trustees	320 Pitt Road Vervale VIC 3814

Trustee Details

Trustee type	Individual Trustees
Individual Trustee 1 Name	Kevin James Hope
Individual Trustee 2 Name	Brian John Hope
Individual Trustee 3 Name	Ian Robert Hope

Pension Details

Confirming Prior Member Instructions or instructing the trustee as of today?	The Member is confirming prior instructions to commence the pension
What date did the Member first request their Pension to be paid?	1 July 2018
Condition of Release	The Pensioner has reached their preservation age at the pension commencement date
Commencement Date	1 July 2018
Financial Year End	30 June 2019
Purchase Price	\$1,247,421.77
Tax Free Component	\$0.00
Taxable Component	\$1,247,421.77
First Year Payment Amount	\$50,000.00
Payment Frequency	at intervals to be determined by the Trustee, but at least one payment will be made during the financial year.

Pensioner Details

Pensioner Name	Ian Robert Hope
Pensioner Gender	Male
Pensioner DOB	20 November 1957
Pensioner Address	14 Edrington Park Drive Berwick VIC 3806

Reversionary Pensioner Details

Reversionary Name	Dianne Lesley Hope
Reversionary DOB	27 August 1961
Reversionary Gender	Female
Relationship to Pensioner	Wife
Reversionary Address	14 Edrington Park Drive Berwick VIC 3806