

Income Stream Reset Answer Summary

As at 7 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 Commutation Details

One or multiple pensions being commuted?	Single Pension
Pension Type(s) being commuted	Transition to Retirement Income Stream

New Pension Commencement Details

Is the new Pension a Transition to Retirement Pension?	no
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 is age sixty five or over
Reset Date	1 July 2018
Financial Year End	30 June 2019
New Purchase Price	\$1,131,582.61

Tax Free Component	\$42,494.70
Taxable Component	\$1,089,087.91
First Year Payment Amount	\$60,000.00
Payment Frequency	annually

Pensioner Details

Pensioner Name	Kevin James Hope
Pensioner Gender	Male
Pensioner DOB	15 January 1953
Pensioner Address	325 Little Road Iona VIC 3815

Reversionary Pensioner Details

Reversionary Name	Mary Patricia Hope
Reversionary DOB	17 March 1948
Reversionary Gender	Female
Relationship to Pensioner	Wife
Reversionary Address	325 Little Road Iona VIC 3815