



**marsh tincknell**  
Chartered Accountants

HALIOS  
Permanent

EB:AM:HAL10S

9 August 2007

The Trustees  
The Vivienne Hallman Super Fund  
789 Fig Tree Pocket Road  
FIG TREE POCKET QLD 4069

Good Morning Vivienne

**RE: COMMENCEMENT OF PENSION**

As discussed, you have decided to commence a Pension as of 1 July 2007.

The pension is subject to the condition that you must at least withdraw 4% of the capital on a yearly basis, calculated on the first day of each income year. There is no upper limit on the amount you can withdraw each year.

The taxation advantage is that the pension payments you will receive will be exempt from tax and further, the Superannuation Fund will also be exempt from tax on its investment earnings.

**Minimum Pension Requirements for the Year Ending 30 June 2008**

Based on the asset values of the Fund as at 30 June 2007, we have calculated the following minimum pension for the year ending 30 June 2008:

	<i>Vivienne</i>
Minimum	\$7,900

Please remember that there is no upper limit.

You must withdraw at least the minimum before 30 June 2008. You can take your pension monthly, annually or any other frequency, including on an "as required" basis. We suggest that you consider how often you wish to take the pension and if it is to be infrequent that you set a diary reminder for June 2008 to ensure that the minimum has been taken for the year. You also could establish a regular period payment to your personal bank account from the super fund eg, \$660 per month.

**Additional Contributions**

You are able to make undeducted contributions of up to \$150,000 per annum until you turn 65. You can also utilise the concessions allowing you to bring forward two years of contributions to allow \$450,000 to be contributed in a single sum.

In addition, you make tax deductible contributions of \$100,000 per annum also until you turn 65.

When you have turned 65 you must be working in order to make further contributions after that time.



Chartered Accountants

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MEMBER

business developmentdivision  
asset protectiondivision  
superannuationdivision  
tax consultingdivision

In summary, to maximise your investment, the amount you could contribute before you turn 65 is as follows:

	<b>2007/08</b>	<b>2008/09</b> <b>(before 18/11/2008)</b>
Deductible contributions	100,000	100,000
Undeducted contributions	150,000	450,000

This would allow a total of \$800,000 to be contributed within the next 15 months should you have the ability to do so.

Please bear in mind that if you do make additional contributions, you will need to advise us so that we can calculate the changes to your pension and we would prefer that you advise before the contribution is made.

### **Pension Documentation**

We enclose documentation to commence the pension as follows:

- Application for Pension from the Member
- Resolutions of the Trustee
- TFN Declaration

If you are happy to proceed with the pension, please sign the documents where indicated and return them to our office at your earliest convenience.

If you have any other queries, please do not hesitate to contact me.

Kind regards



Mari Ashted  
Superannuation Manager

**THE SEAVIEW COMPANY PTY LTD**  
**- AS TRUSTEE FOR -**  
**THE VIVIENNE HALLMAN SUPER FUND**

**RESOLUTION OF THE DIRECTOR**  
**HELD ON 1 JULY 2007**

PRESENT: Vivienne Hallman

**PREVIOUS MEETING**

The Resolution of the previous meeting were read and confirmed as correct.

**COMMENCEMENT OF PENSIONS**

The Chairperson tabled letters requesting the commencement of a Pension for Vivienne from the entire balance of her account.

**RESOLUTIONS**

1. The Trustee determined that Vivienne was eligible to access her benefits as she had satisfied a condition of release on attaining age 60 and retiring.
2. The Trustee reviewed the members' account balance and resolved that there were sufficient unrestricted non-preserved benefits to pay the pension.
3. The Trustee reviewed the Trust Deed and determined that the pensions could provide the payments in accordance with clause 6.1.
4. The Trustee resolved to transfer the member's full account balance to a pension account for the sole purpose of paying the Pension to that member.
5. It was resolved to establish that Vivienne's request for commencement of a Pension be approved and the Pension commence on the start date noted in the Application.
6. The investment strategy was reviewed and it was resolved that the strategy provides sufficient liquidity to pay the Pension as required.
7. It was decided that Marsh Tincknell would prepare a report to the Member detailing the Pension payable for the year ended 30 June 2008 and prepare the necessary documentation to establish and report the commencement of the Pension.

There being no further business the meeting was closed.

SIGN

.....  
CHAIRPERSON

Vivienne Hallman  
789 Fig Tree Pocket Road  
FIG TREE POCKET QLD 4069

1 July 2007

The Trustee  
The Vivienne Hallman Super Fund  
789 Fig Tree Pocket Road  
FIG TREE POCKET QLD 4069

Dear Sir/Madam

Please be advised that I wish to commence a Pension from the entire balance of my benefits as at today's date.

I believe that I am entitled to withdraw my benefits as I am presently 63 years old. I will withdraw a Pension close to the minimum however I may increase that if necessary.

Please advise in due course the minimum amount payable for the Pension for the current financial year.

I will require Pension payments \_\_\_\_\_ at this stage and will advise the amount I wish to withdraw in due course.

Kind regards

**SIGN**

.....  
Vivienne Hallman  
Member

**THE SEAVIEW COMPANY PTY LTD**  
**- AS TRUSTEE FOR -**  
**THE VIVIENNE HALLMAN SUPER FUND**

**RESOLUTION OF THE DIRECTOR**  
**HELD ON 12 AUGUST 2007**

PRESENT: Vivienne Hallman

**PREVIOUS MEETING**

The Resolution of the previous meeting were read and confirmed as correct.

**TERMS OF PENSIONS**

Following receipt of Reports & Documentation prepared by Marsh Tincknell in relation to the commencement of a pension applied for by Vivienne Hallman on 1 July 2007, it was resolved to pay the pension on the following terms:

*Vivienne*

***Pension***

- Initial Purchase Price	\$197,390
- Commencement Date	1 July 2007
- Minimum Pension Payment for 2007/08	\$7,896

***Taxation Components of Purchase Price:***

- Post June 1983 Taxed Element	\$nil
- Tax exempt component	\$197,390

There being no further business the meeting was closed.

**SIGN**

.....  
**CHAIRPERSON**



Australian Government  
Australian Taxation Office

## Tax file number declaration

This declaration is NOT an application for a tax file number.

☑ Please print neatly in BLOCK LETTERS and use a BLACK pen.

☑ Print X in the appropriate boxes.

☑ Make sure you read all the instructions before you complete this declaration.



30920706

www.ato.gov.au

### Section A: To be completed by the PAYEE

What is your tax file number (TFN)?

489 358 284

See Privacy of information on page 6.

OR I have made a separate application/enquiry to the Tax Office for a new or existing TFN. ☐

OR I am claiming an exemption because I am under 18 years of age and do not earn enough to pay tax. ☐

OR I am claiming an exemption because I am a pensioner. ☐

Do you authorise your payer to give your TFN to the trustee of your superannuation fund or to your retirement savings account provider?

Yes ☒ No ☐

What is your name?

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☒

Surname or family name

HALLMAN

First given name

VIVIENNE

Other names

LOUISE

If you have changed your name since you last dealt with the Tax Office, show your previous family name

What is your date of birth?

Day 18 / Month 11 / Year 1943

What is your home address in Australia?

789 FIG TREE POCKET

ROAD

Suburb or town

FIG TREE POCKET

State

QLD

Postcode

4069

7 On what basis are you paid? (Select only one.)

Full-time employment ☐ Part-time employment ☐ Labour hire ☐ Superannuation pension or annuity ☒ Casual employment ☐

8 Are you an Australian resident for tax purposes?

Yes ☒ No ☐ You must answer No at question 9.

9 Do you want to claim the tax-free threshold from this payer?

If you have more than one source of income and currently claim the tax-free threshold from another payer, do not claim it now.

Yes ☒ No ☐ Answer No at questions 10 and 11 unless you are a non-resident claiming a senior Australians, zone or overseas forces tax offset.

ONLY CLAIM THE TAX-FREE THRESHOLD FROM ONE PAYER.

10 Do you want to claim family tax benefit or the senior Australians tax offset by reducing the amount withheld from payments made to you?

Yes ☐ Complete a Withholding declaration, but only if you are claiming the tax-free threshold from this payer. If you have more than one payer, see page 3. No ☒

11 Do you want to claim a zone, overseas forces, dependent spouse or special tax offset by reducing the amount withheld from payments made to you? Yes ☐ Complete a Withholding declaration. No ☒

12 (a) Do you have an accumulated Higher Education Loan Programme (HELP) debt?

Yes ☐ Your payer will withhold additional amounts to cover any compulsory repayments. No ☒

(b) Do you have an accumulated Financial Supplement debt?

Yes ☐ Your payer will withhold additional amounts to cover any compulsory repayments. No ☒

13 If you have an annuity or superannuation pension, do you want to claim entitlements to a deductible amount or tax offset?

Yes ☒ Your superannuation provider or the organisation that sold you your annuity will work out your entitlement. No ☐

DECLARATION by payee: I declare that the information I have given is true and correct.

Signature

Date

Day / Month / Year

There are penalties for deliberately making a false or misleading statement.

Once this form is completed and signed, send the original to the Tax Office and keep your copy in a secure place.

### Section B: To be completed by the PAYER

What is your Australian business number (ABN) (or your withholding payer number if you are not in business)?

Branch number (if applicable)

78 923 591 573

If you don't have an ABN or withholding payer number, have you applied for one?

Yes ☐ No ☒ See 'More information for payers' on page 6.

What is your registered business name or trading name (or your individual name if not in business)?

THE VIVIENNE HALLMA

N SUPER FUND

DECLARATION by payer: I declare that the information I have given is true and correct.

Signature of payer

Date

Day / Month / Year

There are penalties for deliberately making a false or misleading statement or failing to forward the original to the Tax Office.

4 What is your business address?

LEVEL 1, 1454 LOGAN

ROAD

Suburb or town

MOUNT GRAVATT

State

QLD

Postcode

4122

5 Who is your contact person?

TIMOTHY DAVIS

Business phone number 07 3422 8000

6 If you no longer make payments to this payee, print X in this box ☐

Return completed original Tax Office copy to:

For WA, SA, NT, VIC or TAS  
Australian Taxation Office  
PO Box 795  
ALBURY NSW 2640

For NSW, QLD or ACT  
Australian Taxation Office  
PO Box 9004  
PENRITH NSW 2740

Please estimate the time taken to complete section B.

mins

TAXPAYER-IN-CONFIDENCE (when completed)

# Member's Statement

## THE VIVIENNE HALLMAN SUPER FUND

**VIVIENNE LOUISE HALLMAN**  
**789 FIG TREE POCKET ROAD**  
**FIG TREE POCKET QLD 4069**

The Trustee of the above named fund wish to advise you of the circumstances of your entitlement in the Fund at 30 June 2007 and for the reporting period 1 July 2006 to 30 June 2007.

Your Details		Your Balance	
Date of Birth	18 November 1943	<b>Total Benefits</b>	<b>\$197,390</b>
Date Joined Fund	7 December 2000	Comprising:	
Service Period Start Date	7 December 2000	- Preserved	\$197,142
Date Left Fund		- Restricted Non Preserved	
Member Mode	Accumulation	- Unrestricted Non Preserved	\$248
Account Description		Including:	
Current Salary		- CGT Exempt	
Vested Amount	\$197,390	- Non qualifying	
Insured Death Benefit		- Concessional	
Total Death Benefit	\$197,390	- Undeducted Contributions	\$197,430
Disability Benefit		- Government Co-Contributions	
Transitional RBL Pension		- Non Vested Contributions	
Transitional RBL Lump Sum		- Post June 1994 Invalidity	
Nominated Beneficiaries		- Pre Jul 1983	
		- Post June 1983 - Taxed	(\$40)
		- Post June 1983 - Untaxed	

Your Detailed Account		Preserved	Restricted Non Preserved	Unrestricted Non Preserved	Total
Opening Balance at 1 July 2006				248	248
<u>Add: Increases to Member's Account During the Period</u>					
Employer Contributions		196,830			196,830
Member Contributions					
Proceeds of Insurance Policies		312			312
Share of Net Income/(Loss) for period					
Transfers in and transfers from reserves		197,142			197,142
		197,142		248	197,390
<u>Less: Decreases to Member's Account During the Period</u>					
Benefits/Pensions Paid					
Contributions Tax					
Income Tax					
Insurance Policy Premiums Paid					
Management Fees					
Share of fund expenses					
Superannuation Surcharge Tax					
Transfers out and transfers to reserves					
<b>Member's Account Balance at 30 June 2007</b>		<b>197,142</b>		<b>248</b>	<b>197,390</b>

Reference: HAL10S / 501

47. = \$7,896

HALIZS  
Permanent

Vivienne Hallman  
789 Fig Tree Pocket Road  
FIG TREE POCKET QLD 4069

1 July 2007

The Trustee  
The Vivienne Hallman Super Fund  
789 Fig Tree Pocket Road  
FIG TREE POCKET QLD 4069

Dear Sir/Madam


Please be advised that I wish to commence a Pension from the entire balance of my benefits as at today's date.

I believe that I am entitled to withdraw my benefits as I am presently 63 years old. I will withdraw a Pension close to the minimum however I may increase that if necessary.

Please advise in due course the minimum amount payable for the Pension for the current financial year.

I will require Pension payments \_\_\_\_\_ at this stage and will advise the amount I wish to withdraw in due course.

Kind regards

A handwritten signature in black ink, appearing to read 'V. L. Hallman', is written over a dotted line. To the left of the signature, the word 'SIGN' is printed in red.

Vivienne Hallman  
Member



HALIZS  
Permanent

THE SEAVIEW COMPANY PTY LTD  
- AS TRUSTEE FOR -  
THE VIVIENNE HALLMAN SUPER FUND

RESOLUTION OF THE DIRECTOR  
HELD ON 12 AUGUST 2007

PRESENT: Vivienne Hallman

PREVIOUS MEETING

The Resolution of the previous meeting were read and confirmed as correct.

TERMS OF PENSIONS

Following receipt of Reports & Documentation prepared by Marsh Tincknell in relation to the commencement of a pension applied for by Vivienne Hallman on 1 July 2007, it was resolved to pay the pension on the following terms:

*Vivienne*

**Pension**

- Initial Purchase Price	\$197,390
- Commencement Date	1 July 2007
- Minimum Pension Payment for 2007/08	\$7,896

**Taxation Components of Purchase Price:**

- Post June 1983 Taxed Element	\$nil
- Tax exempt component	\$197,390

There being no further business the meeting was closed.

SIGN

*V. L. Hallman*

CHAIRPERSON

**THE SEAVIEW COMPANY PTY LTD**  
- AS TRUSTEE FOR -  
**THE VIVIENNE HALLMAN SUPER FUND**

**RESOLUTION OF THE DIRECTOR**  
**HELD ON 1 JULY 2007**

PRESENT: Vivienne Hallman

**PREVIOUS MEETING**

The Resolution of the previous meeting were read and confirmed as correct.

**COMMENCEMENT OF PENSIONS**

The Chairperson tabled letters requesting the commencement of a Pension for Vivienne from the entire balance of her account.

**RESOLUTIONS**

1. The Trustee determined that Vivienne was eligible to access her benefits as she had satisfied a condition of release on attaining age 60 and retiring.
2. The Trustee reviewed the members' account balance and resolved that there were sufficient unrestricted non-preserved benefits to pay the pension.
3. The Trustee reviewed the Trust Deed and determined that the pensions could provide the payments in accordance with clause 6.1.
4. The Trustee resolved to transfer the member's full account balance to a pension account for the sole purpose of paying the Pension to that member.
5. It was resolved to establish that Vivienne's request for commencement of a Pension be approved and the Pension commence on the start date noted in the Application.
6. The investment strategy was reviewed and it was resolved that the strategy provides sufficient liquidity to pay the Pension as required.
7. It was decided that Marsh Tincknell would prepare a report to the Member detailing the Pension payable for the year ended 30 June 2008 and prepare the necessary documentation to establish and report the commencement of the Pension.

There being no further business the meeting was closed.

  
CHAIRPERSON

Vivienne Hallman  
789 Fig Tree Pocket Road  
FIG TREE POCKET, QLD, 4069

The Trustees  
789 Fig Tree Pocket Road  
FIG TREE POCKET, QLD, 4069

Dear Sir/Madam

RE: Vivienne Hallman  
Request to withdraw benefits

I, Vivienne Hallman hereby request to withdraw an amount of \$440 from my superannuation benefits.

I am presently 62 years old and I believe I have sufficient unrestricted non preserved monies available to make the withdrawal.

If you find my application successful, please make the payment of \$440 as requested and prepare any paperwork that I may have to sign.

Kind regards



Vivienne Hallman

**RESOLUTION OF THE DIRECTOR OF THE SEAVIEW COMPANY PTY  
LTD AS THE TRUSTEE OF THE VIVIENNE HALLMAN  
SUPERANNUATION FUND**

**789 FIG TREE POCKET ROAD, FIG TREE POCKET, QLD 4069  
ON 08 MAY 2006**

**Present:** Vivienne Hallman

**Resolution:** The resolution of the previous meeting was signed as an accurate record.

It was **RESOLVED** that the application for payment of benefits received from Vivienne Hallman for the amount of \$440 be approved.

The trustee considered that the member had sufficient funds in unrestricted non-preserved monies.

It was **FURTHER RESOLVED** that the payment to the member be made immediately and that the necessary ETP and RBL paperwork be prepared for lodgement with the Australian Taxation Office.

This concluded the business of the meeting.

VH  
**SIGN** V. L. Hallman

The Director of Seaview Company Pty Ltd