

Centrelink / DVA Schedule

(Details of income stream product)

Depending on your individual circumstances, it may be necessary for you to provide this schedule to your local Centrelink or Department of Veterans' Affairs (DVA) office.

This schedule provides information to enable Centrelink or the DVA to work out your benefit entitlement. Please contact your Centrelink or DVA office for details.

This information is for Social Security assessment purposes only and should not be used for taxation purposes.

Centrelink or DVA Customer Reference Number	Not set
Member's Name	Mr Raymond Haigh
Date of Birth	19 July 1942
Provider Name (Fund Name)	R & N Haigh Superannuation Fund
Provider ABN	21 073 191 384
Fund Mailing Address	PO Box 83 MOUNT GRAVATT, QLD 4122
Product Name	Pension Account (Pre 1 Jan 2015)
Type of Income Stream	Allocated
Regulated by	Superannuation Industry (Supervision) Act 1993
Has this income stream been split as part of a property settlement on marriage breakdown?	No
Is this income stream paid from a SMSF or SAF?	Yes
Does the income stream meet ALL the characteristics required under section 9A or 9B of the Social Security Act 1991? (Asset Test Exemption)	No
Date of Purchase	1 July 2014
Purchase Price	385,348.23
Reversionary Beneficiary Nominated	Yes
Relevant Number (RN) / Pension Term (Years)	17.42
Commutation	No
Account Balance at 1 July	268,215.17
Current Account Balance	268,215.17
Date of Account Balance	1 July 2023
Gross Annual Payment	18,780.00
Payment Frequency	Monthly
Gross Periodic Payment	1,565.00

Trustee Signature:

Date: / /

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Centrelink or DVA Customer Reference Number	Not set
Member's Name	Mrs Nola Haigh
Date of Birth	13 July 1943
Provider Name (Fund Name)	R & N Haigh Superannuation Fund
Provider ABN	21 073 191 384
Fund Mailing Address	PO Box 83 MOUNT GRAVATT, QLD 4122
Product Name	Pension Account (Pre 1 Jan 2015)
Type of Income Stream	Allocated
Regulated by	Superannuation Industry (Supervision) Act 1993
Has this income stream been split as part of a property settlement on marriage breakdown?	No
Is this income stream paid from a SMSF or SAF?	Yes
Does the income stream meet ALL the characteristics required under section 9A or 9B of the Social Security Act 1991? (Asset Test Exemption)	No
Date of Purchase	1 July 2014
Purchase Price	168,027.72
Reversionary Beneficiary Nominated	Yes
Relevant Number (RN) / Pension Term (Years)	17.42
Commutation	No
Account Balance at 1 July	109,421.37
Current Account Balance	109,421.37
Date of Account Balance	1 July 2023
Gross Annual Payment	6,570.00
Payment Frequency	Monthly
Gross Periodic Payment	547.50

Trustee Signature:

Date: / /