

THE I & M ROBERTSON SUPERFUND
(ABN: 76 841 430 505)

Brenda Wishey

Consolidated Member Benefit Totals

Period	Member Account Details
1 July 2020 – 30 June 2021	Residential Address: 30-34 Sugarglider Court Mount Cotton QLD 4165
Member Number: ROBE11	Date of Birth: 21 May 1950 Date Joined Fund: 17 June 1998 Eligible Service Date: 17 June 1998
Mr Ian Phillip Robertson	Tax File Number Held: Yes

*Note: this report provides a consolidated view of the Member's interests in the SMSF
Refer to the Member Benefit Statements produced for each member account for further details*

Your Accounts	
Withdrawal Benefit as at 01 Jul 2020	
Accumulation	173,995.66
Total as at 01 Jul 2020	173,995.66
Withdrawal Benefit as at 30 Jun 2021	
Accumulation	95,254.00
Total as at 30 Jun 2021	95,254.00
Your Investment Return	
The return on your Investment for the year	-46.88%

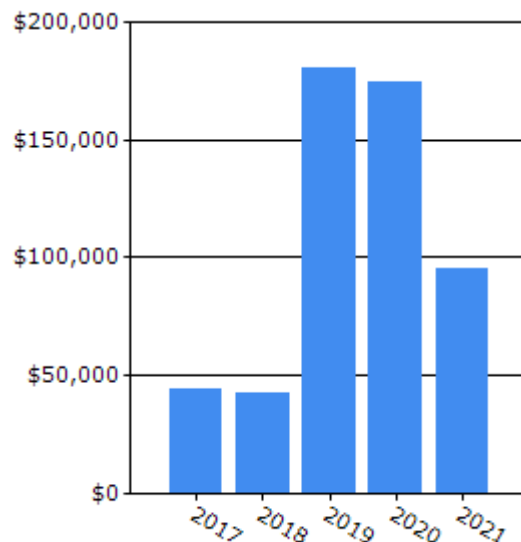
Your Tax Components	
Tax Free	51,601.24
Taxable Taxed	43,652.76
Taxable Untaxed	-

Your Preservation Components	
Preserved	-
Restricted Non Preserved	-
Unrestricted Non Preserved	95,254.00

Your Insurance Benefits	
No insurance details have been recorded	

Your Beneficiaries	
Non Lapsing Binding Death Nomination*	
The following persons to receive benefits in the event Ian Phillip Robertson dies	
1. Kelli Jayne Kugler daughter to receive 1/3	
2. Paul Ian Robertson son to receive 1/3	
3. Grant Anthony Robertson son to receive 1/3	
* Nomination in effect from 7 February 2012	

Member Balance History



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THE I & M ROBERTSON SUPERFUND
(ABN: 76 841 430 505)

Member Benefit Statement

Period	
1 July 2020 – 30 June 2021	
Member	Number: ROBEI1
Mr Ian Phillip Robertson	
Accumulation Account	
Accumulation	

Member Account Details

Residential Address:	30-34 Sugarglider Court Mount Cotton QLD 4165
Date of Birth:	21 May 1950
Date Joined Fund:	17 June 1998
Eligible Service Date:	17 June 1998
Tax File Number Held:	Yes
Account Start Date:	17 June 1998

Your Account Summary

Withdrawal Benefit as at 01 Jul 2020	173,995.66
<u>Increases to your account:</u>	
Employer Contributions	3,707.48
Tax on Net Fund Income	556.12
<u>Total Increases</u>	4,263.60
<u>Decreases to your account:</u>	
Share Of Net Fund Income	82,449.14
Contributions Tax	556.12
<u>Total Decreases</u>	83,005.26
Withdrawal Benefit as at 30 Jun 2021	95,254.00

Your Tax Components

Tax Free	54.17%	51,601.24
Taxable Taxed		43,652.76
Taxable Untaxed		-

Your Preservation Components

Preserved	-
Restricted Non Preserved	-
Unrestricted Non Preserved	95,254.00

Your Insurance Benefits

No insurance details have been recorded

Your Beneficiaries

Non Lapsing Binding Death Nomination*

The following persons to receive benefits in the event Ian Phillip Robertson dies

1. Kelli Jayne Kugler daughter to receive 1/3
2. Paul Ian Robertson son to receive 1/3
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* Nomination in effect from **7 February 2012**

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