

# Superannuation lump sum pre-payment statement

Warning: This form has been designed to assist you to prepare the Australian Tax Office's Superannuation lump sum pre-payment statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

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## Part 1 - SUPERANNUATION PROVIDER TO COMPLETE

### Section A: Superannuation provider details

#### 1 Superannuation fund, ADF, RSA or annuity provider name

BARBARO SUPERANNUATION FUND

#### 2 Postal address

3 SEVILLE AVENUE  
PARA HILLS SA 5096

#### 3 Australian business number (ABN) or withholder payer number

#### 4 Authorised contact person

BARBARA BARBARO

#### 5 Daytime phone number

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### Section B: Member's details

#### 6 Full name

Title

MR

Family Name

BARBARO

First given name

Other given names

PETER JOHN

#### 7 Postal address

19 - 23 GRAHAM STREET  
WINGFIELD SA 5013

#### 8 Date of birth

23/07/1968

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**Section C: Superannuation lump sum payment details****9 Lump sum payment is calculated to this date**

22/02/2011

**10 Superannuation lump sum components**

Taxable component

Taxed element \$ 167,180.26

Untaxed element \$

Tax-free component \$ 4,761.80

**Total amount** \$ 171,942.06**11 Preservation amounts of the superannuation lump sum**

Preserved amount \$ 171,942.06

Restricted non-preserved amount \$

Unrestricted non-preserved amount \$

**Total amount** \$ 171,942.06

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**Section D: Superannuation provider's signature****12 Date the statement is issued to the member**

/ /

**13 Member is to return statement by**

/ /

**14 Superannuation fund's, ADF's, RSA's or annuity provider's signature**

Date

/ /


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**Section E: Cash amount**

1 Pay me a gross cash amount of:

\$

I understand that this amount  
may be subject to tax

 You may wish to speak with a tax professional or your superannuation fund, ADF, RSA or annuity provider to make sure you are aware of your tax obligations and superannuation roll over options.

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**Section F: Rollover payment**

2 Roll over my payment to: (provide the full name of fund, RSA or annuity provider)

FSM BARBARO SUPERANNUATION FUND

3 Fund ABN

4 Superannuation fund, ADF, RSA or annuity provider postal address:

19 - 23 GRAHAM STREET  
WINGFIELD SA 5013

5 Member account number

6 Roll over an amount of:

\$

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**Section G: Member's declaration**

*I authorise my superannuation lump sum to be paid as instructed on this statement.*

PETER JOHN  
BARBARO

Signature

Date


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Give this completed statement to your super fund. You should keep a copy for your records for a period of five years.

# Rollover benefits statement

Complete this form if:

- you are a trustee of a super fund, and
- a member asks you to roll over a benefit payment for them.

 If a member asks you to roll over parts of their entitlement to more than one fund, you must complete separate statements for each rollover payment.

**Warning:** This form has been designed to assist you to prepare the Australian Tax Office's Rollover benefits statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

## Section A: Receiving fund's details

1 Australian business number (ABN)

2 Name

FSM BARBARO SUPERANNUATION FUND

3 Postal address

19 - 23 GRAHAM STREET  
WINGFIELD SA 5013

4 You must provide at least one of the receiving fund's numbers below :

Member account number

Superannuation product identification  
number (SPIN)

## Section B: Member's details

5 Tax File Number

150398513

6 Full name

Title

MR

Family Name

BARBARO

First given name

Other given names

PETER JOHN

7 Postal address

19 - 23 GRAHAM STREET  
WINGFIELD SA 5013

8 Date of birth

23/07/1968

9 Sex

M

10 Daytime phone number

11 Email address

**Section C: Rollover payment details**

**12 Service period start date**

07/04/1997
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**13 Rollover components:**

Tax-free component

\$	4,761.80
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Taxable component

Element taxed in the fund

\$	167,180.26
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Element untaxed in the fund

\$	
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**14 Preservation amounts:**

Preserved amount

\$	171,942.06
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Restricted non-preserved amount

\$	
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Unrestricted non-preserved amount

\$	
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**15 Contributed amounts**

Financial year ending

30/06/2011
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**This rollover includes the following contributions made during the current financial year.**

a. Employer Contributed amount

\$	
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b. Personal contributed amount

\$	
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c. CGT cap election amount:

Small business retirement exemption amount

\$	
----	--

Small business 15-year exemption amount

\$	
----	--

d. Personal injury election amount

\$	
----	--

e. Spouse and child contributions amount

\$	
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f. Other Family and friend contributions amount

\$	
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g. Directed termination payments(taxable component) amount

\$	
----	--

h. Assessable foreign fund amount

\$	
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i. Non-assessable foreign fund amount

\$	
----	--

j. Transferred from reserves amount:

Assessable amount

\$	
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Non-assessable amount

\$	
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k. All contributions received for the current year

\$	
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**Section D: Your details**

**16 Fund's ABN**

**17 Fund's name**

**18 Contact name**

**19 Email address**

**20 Daytime phone number**

Telephone No

**Signature of authorised person**

Date

You do not need to send a copy of the statement to the ATO however, you must keep a copy for your records for a period of five years.

# PAYG Payment Summary - Superannuation Lump Sum

Payment summary for year ending 30 June 2011

Warning: This form has been designed to assist you to prepare the Australian Tax Office's PAYG Payment Summary Statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

## Payee Details

Payee's surname or family name

BARBARO

Payee's given name(s)

PETER JOHN

Payee's address

19 - 23 GRAHAM STREET

WINGFIELD SA 5013

Date of birth

23/07/1968

**NOTICE TO PAYEE** If this payment summary shows an amount in the total tax withheld box, you must lodge a tax return. If no tax was withheld, you may still have to lodge a tax return. If you have already lodged your tax return, you may need to lodge an amendment request. For more information about this payment summary, lodging your tax return or an amendment request, you can : - visit [www.ato.gov.au](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61

Date of payment

22/02/2011

Payee's Tax File Number

150398513

Total Tax withheld

\$

Taxable component

Taxed element

167,180

Untaxed element

Tax free component

4,761

Death benefit

Type of death benefit

## Payer Details

Payer's ABN or Withholder Payer Number

Branch Number

Payer's Name

BARBARO SUPERANNUATION FUND

Signature of authorised person

Date

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