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.

Part 1 - SUPERANNUATION PROVIDER TO COMPLETE

Section A: Superannuation provider details

1 Superannuation fund, ADF, RSA or annuity provider name

I A NEIL PENSION FUND

2 Postal address

146 BLOOMFIELD STREET

CLEVELAND   QLD   4163

3 Australian business number (ABN) or withholder payer number

28077080587

4 Authorised contact person

SHONA LORRAINE SHERMAN

5 Daytime phone number

07 32861322

Section B: Member's details

6 Full name

Title

Family Name

NEIL

First given name

Other given names

IAN ALEXANDER

7 Postal address

94 GODDARD ROAD

THORNLANDS   QLD   4164

8 Date of birth   27/08/1957

Section C: Superannuation lump sum payment details

9   Lump sum payment is calculated to this date

13/07/2015

10   Superannuation lump sum components

Taxable component

Taxed element	$	1,423.12
Untaxed element	$	
Tax-free component	$	576.88
KiwiSaver tax-free component	$	
Total amount	$	2,000.00

11   Preservation amounts of the superannuation lump sum

Preserved amount	$	1,996.96
Restricted non-preserved amount	$	3.04
Unrestricted non-preserved amount	$	
Total amount	$	2,000.00

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

/   /

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.

Section F: Rollover payment

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

SUNSUPER PTY LTD

3   Fund ABN

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

30 LITTLE CRIBB STREET
MILTON   QLD   4001

5   Member account number

6   Roll over an amount of: $ 2,000.00

Section G: Member's declaration

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

IAN ALEXANDER NEIL

Signature   Date   /   /

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 then 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

1   Australian business number (ABN)

2   Fund name

SUNSUPER PTY LTD

3   Postal address

30 LITTLE CRIBB STREET
MILTON   QLD   4001

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

(a) Unique superannuation identifier (USI)

98503137921001

(b) Member client identifier

900276380

Section B: Member's details

5   Tax File Number (TFN)

482794141

6   Full name

Title

Family Name

NEIL

First given name

IAN ALEXANDER

Other given names

7   Residential address

94 GODDARD ROAD
THORNLANDS   QLD   4164

8   Date of birth

27/08/1957

9   Sex

M

10 Daytime phone number   (include area code)

11 Email address   (if applicable)

Section C: Rollover transaction details

12 Service period start date

04/08/1975

13 Tax components

Tax-free component

$ 576.88

KiwiSaver tax-free component

$

Taxable component:

Element taxed in the fund

$ 1,423.12

Element untaxed in the fund

$

Tax components TOTAL

$ 2,000.00

14 Preservation amounts

Preserved amount

$ 1,996.96

KiwiSaver preserved amount

$

Restricted non-preserved amount

$ 3.04

Unrestricted non-preserved amount

$

Preservation amounts TOTAL

$ 2,000.00

Section D: Non-complying funds

15 Contributions made to a non-complying fund on or after 10 May 2006

$

Section E: Transferring fund

16 Fund ABN

28077080587

17 Fund name

I A NEIL PENSION FUND

18 Contact name

SHONA LORRAINE SHERMAN

19 Daytime phone number   (include area code)

Telephone No   07 32861322

20 Email address   (if applicable)

team@howefordboxer.com.au

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 2016

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

NEIL

Payee's given name(s)

IAN ALEXANDER

Payee's address

94 GODDARD ROAD

THORNLANDS   QLD   4164

Date of birth | 27/08/1957

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 - refer to TaxPack - phone 13 28 61

Date of payment | 13/07/2015

Payee's Tax File Number | 482794141

Total Tax withheld $

Taxable component

Taxed element | 1,423

Untaxed element |

Tax free component | 576

KiwiSaver tax-free component |

Death benefit |

Type of death benefit |

Payer Details

Payer's ABN or Withholder Payer Number | 28077080587

Branch Number |

Payer's Name

I A NEIL PENSION FUND

Signature of authorised person

Date   /   /