

SUPERANNUATION FUNDS

Reasonable benefit limits (RBL)

reporting form

Warning: This form has been designed by BGL to assist clients to prepare the original RBL form provided by the ATO. This form CANNOT be lodged with the ATO and will not be accepted by them. Only the Original ATO form can be lodged.

SECTION A: Fund details

* 1 Fund's tax file number (TFN)

830 791 340

2 Fund's Australian business Number (ABN)

* 3 Fund's current name

BARNETT SUPERANNUATION FUND

4 Fund's previous name if it has changed since last reported

* 5 Fund's street address

8 BATES STREET
SPRINGWOOD QLD 4127

6 Fund's postal address (leave blank if same as street address)

* 7 For the purpose of paying this benefit, you were operating as:

- | | |
|-------------------------------------|-------------------------------------|
| Superannuation Fund | <input checked="" type="checkbox"/> |
| Approved Deposit Fund | <input type="checkbox"/> |
| Life Assurance Company | <input type="checkbox"/> |
| Retirement Savings Account Provider | <input type="checkbox"/> |

8 Fund's contact person

Title

Name

Business hours phone number

Facsimile number

SECTION B: Recipient's Details

For some benefits paid after the death of a person you must show details of the deceased in this section.

9 Recipient's TFN

10 What is the number you use to identify the recipient ?

*** 11 Recipient's name**

Title	MR
Family name	BARNETT
Given names	JOHN

12 Recipients previous full name if it has changed since last reported

Title	
Family name	
Given names	

*** 13 Date of Birth**

14 Sex Male Female Information not available

*** 15 Recipient's postal address (if recipient is deceased enter their last known address)**

8 BATES STREET SPRINGWOOD QLD 4127

16 Has mail sent to the above address been returned to you ? Yes
No

SECTION C: Report Type - new benefit or amendment

* 17 Are you reporting a new benefit or amending details of a benefit previously reported

A New Benefit. Go to 22
Amendment Go to 18

18 Previously reported benefit payment date

19 Type of benefit previously reported

Lifetime purchased pension or non-purchased pension
Annuity or non-lifetime purchased pension (including) allocated
ETP
Death Benefit ETP
Direct Roll-over of Commutation or Residual Capital Value or reduction due to marriage breakdown

20 Amount of benefit previously reported

21 What is the reference number for the benefit previously reported ?

Go to 22

SECTION D Benefit Details

* 22 Start date of eligible service period

* 23 Benefit payment date

24 Number of pre-July 1983 days

25 Number of post-June 1983 days

26 15 February 1990 rollover balance

27 Amount used or paid from
15 February 1990 rollover balance

28 What is your reference number for the benefit being reported ?

29 Is this benefit being paid due to marriage breakdown ? Yes Go to 30
No Go to 31

30 Is the recipient a non-member spouse ? Yes u Date of birth of member spouse
No

31 Benefit Type

Lifetime purchased pension or non-purchase pension Go to 35
Annuity or non-lifetime purchased pension (including) allocated pension u Pension or annuity standards met ? Yes Go to 32
ETP No
Death Benefit ETP u Go to 32
Direct Roll-over of Commutation or Residual Capital Value or reduction due to marriage breakdown

* 32 Payment component details

Capital gains (CGT) exempt component	A	<input type="text"/>
Undeducted contributions	B	\$490,681.35
Concessional component	C	<input type="text"/>
Pre-July 1983 component	D	\$11,318.65
Post-June 1983 taxed element	E	<input type="text"/>
Post-June 1983 untaxed element	F	<input type="text"/>
Post-June 1994 invalidity component	G	<input type="text"/>

* 33 Total benefit amount H \$

* 34 Does this benefit arise from a previous pension or annuity? Yes Go to 48
No u Is this a death benefit ETP? Yes Go to 54
No Go to Section H

SECTION E: Lifetime purchased pension or non-purchased pension

35 Expected payment in year 1

36 Term of pension (years)

37 Undeducted purchase price

38 Is the pension rebatable ?
Yes
No

39 Rate of indexation

40 Level of reversion

41 Does the pension have a residual capital value (RCV)?
Yes u
No

42 Pension standards met ?
Yes
No

43 Was the recipient a member of the fund at 15th August 1989?
Yes
No

44 Is the pension a disability superannuation pension?
Yes
No

* 45 Does this benefit arise from a previous pension ?
Yes Go to 46
No Go to Section H

SECTION F: Details of a previous pension or annuity from which this benefit arose

46 The benefit arose from the pension or annuity due to:

Commutation (wholly or partly converted to a lump sum other than because of marriage breakdown)

Marriage breakdown

Residual capital value being paid (lump sum paid at the end of the term of a pension annuity)

47 Your reference number for the previous pension or annuity

48 Commencement date of the previous pension or annuity

49 Previous benefit type

Lifetime purchased pension or non purchased pension

Annuity or non-lifetime purchased pension (including allocated pension)

50 Did the previous benefit meet the pension or annuity standards? Yes Go to 51
No Go to 52

51 Was marriage breakdown the reason for commutation? Yes
No

52 Was the reason for the commutation to purchase another pension or annuity that meets the standards? Yes
No

53 Is the original recipient deceased ? Yes Go to 54
No Go to Section G

SECTION G: Beneficiary Details where details of deceased are given in Section B

54 Beneficiary's name

Title

Family Name

Given name

55 Beneficiary's TFN

56 Beneficiary's date of birth

57 Beneficiary's sex

Male

Female

Information not available

58 Beneficiary's postal address

SECTION H: Declaration

** I am the payer or a person authorised to sign on behalf of the payer, and the information is accurate and complete.*

Signature

Date of signature

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479642711

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06/05/1947

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