

Super transfer balance account report

Who should complete this report?

Super providers and life insurance companies should complete this report when:

- there is a transfer balance account reporting requirement
- further information is required to calculate a member's total super balance
- further information is required to determine a member's concessional contributions amount
- incorrect information has previously been reported to us.

The obligation to report is on:

- the trustee of the fund for a super fund, including self-managed super funds (SMSFs) or an approved deposit fund (ADF)
- the retirement savings account (RSA) provider for an RSA
- a director of the life insurance company for a life insurance company.

Instructions

Follow the Super transfer balance account report instructions for assistance when completing this report.

You must complete and lodge separate reports for each member. If you have more than four events to report for a member you must lodge separate reports. However, if you are reporting a child death benefit income stream or a child reversionary income stream you can only report one event per report.

To cancel or update information already reported to us, you must cancel the original report. Ensure the "Yes" box in Section B is clearly marked and lodge the report exactly the same as the original event. A new report can then be lodged with the correct information.

Completing this report

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

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 \blacksquare Place X in ALL applicable boxes.



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1	Tax file number (TFN) You don't have to provide the TFN to us. However, if you do, it will help us identify the member correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy																															
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Se	ection B: Cancellation
5	Are you cancelling a previous transfer balance account event? No Yes Omplete this report exactly the same as the original event. If you previously reported multiple events you only need to include details of the event/s you wish to cancel. Refer to the instructions for more information on how to cancel a previous report.
_	ection C: Fund/Supplier/Provider details If you are an SMSF trustee completing this report for a member of your SMSF you may leave questions 6 and 7 blank.
6 	Intermediary/Supplier name
7	Australian business number (ABN) Your contact details are required in case we need to speak to you about details supplied on this report. Provide your contact details in Section G.
8 T	Fund/Provider name HEROBDOWN SUPERANNUATION FUND
9	Fund/Provider ABN 18 965 338 768
10	Fund/Provider TFN You don't have to provide the TFN to us. However, if you do, it will help us identify the fund/provider correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy

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Se	ection D-1: Event one
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a second event in Section D-2.
11	Is the first event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event X Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16.
Tra	ansfer balance cap event
12	Commutation authority
	An event that occurred in response to a commutation authority issued by the ATO.
	A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type:
	Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit
	Go to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type:
	Super income stream
	Reversionary income stream
	LRBA repayment
	If you select one of the below events you can only report one event in this report. Refer to the instructions for more information.
	Child death benefit income stream
	Child reversionary income stream Go to Event details on the next page.
14	Other transfer balance cap event Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation X
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
	② Go to Event details on the next page.

15 Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to tac jours and total super balance of a member. Refer to tac jours and total super balance of a member. Refer to tac jours and total super balance and is only required from 30 June 2018. Event type: Accumulation phase value Retirement phase value (30 June 2018 only) Retirement phase value is used to activate your member's betain the analysis of the concessional contributions into member. Retirement phase value (30 June 2018 only) Retirement phase value (30 June 2017 - Retirement phase value (30 June 2018 only) Retirement phase value (30 Ju	Ot	her information
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Levent type: Accumulation phase value		Complete this question to provide information regarding the total super balance of a member.
Accumulation phase value		used to calculate your member's total super balance and is only required from 30 June 2018.
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Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details 1 You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. Value	16	
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17 Effective date 0 9 / 0 8 / 2 0 2 1 18 Value \$	•	commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section.
19 If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-1: Member account details ① Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. 20 Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Wember account number C U	17	
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22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank 23 Member account number CUKHEL00001P	21	
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24 Member client identifier (number)	23	Member account number
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Se	ection D-2: Event two
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a third event in Section D-3.
11	Is the second event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16
Tra	ansfer balance cap event
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type: Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit Go to Event details on the next page.
12	
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type: Super income stream
	Reversionary income stream
	LRBA repayment
14	Other transfer balance cap event Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017 Go to Event details on the next page.
	GO to Event details on the next page.

	her information
13	Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance.
	Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018.
	Event type: Accumulation phase value Retirement phase value (30 June 2018 only)
16	Concessional contributions Information regarding the notional taxed contributions of a member.
	Only use this event type if you are reporting information for your member's notional taxed contributions.
	Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards)
Ev	ent details
0	You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section.
17	Effective date
18	Value \$
19	If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system)
	① Only complete this question if the Reporting event type is Commutation authority – commuted in full or
	Commutation authority – commuted in part.
	If unknown leave this question blank.
	No Yes
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Se	ection E-2: Member account details
0	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question.
20	Member account type
	Account-based income stream
	Capped defined benefit income stream just before 1 July 2017
	Market-linked capped defined benefit income stream just before 1 July 2017
	Capped defined benefit income stream on or after 1 July 2017
21	Is the account closed?
	No Yes
22	Unique superannuation identifier (USI) If you don't have a USI leave this question blank
	If you don't have a osheave this question blank
23	Member account number
24	Member client identifier (number) If you don't have a member client identifier leave this question blank
	In your distriction of the fill the fil

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Se	ection D-3: Event three
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a fourth event in Section D-4.
11	Is the third event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16
Tra	ansfer balance cap event
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type: Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit
	So to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type: Super income stream
	Reversionary income stream
	LRBA repayment
14	Other transfer balance cap event
	Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
	So to Event details on the next page.

	her information
13	Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance.
	Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018.
	Event type: Accumulation phase value Retirement phase value (30 June 2018 only)
16	Information regarding the notional taxed contributions of a member.
	Only use this event type if you are reporting information for your member's notional taxed contributions.
	Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards)
Ev	ent details
0	You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section.
17	Effective date
18	Value \$
19	If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system)
	① Only complete this question if the Reporting event type is Commutation authority – commuted in full or
	Commutation authority – commuted in part.
	If unknown leave this question blank.
	No Yes
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Se	ection E-3: Member account details
U	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question.
20	Member account type
	Account-based income stream
	Capped defined benefit income stream just before 1 July 2017
	Market-linked capped defined benefit income stream just before 1 July 2017
	Capped defined benefit income stream on or after 1 July 2017
21	Is the account closed?
	No Yes Yes
22	Unique superannuation identifier (USI) If you don't have a USI leave this question blank
23	Member account number
24	Member client identifier (number) If you don't have a member client identifier leave this question blank

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Se	ection D-4: Event four												
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section.												
11	Is the fourth event:												
	A response to a commutation authority Go to question 12.												
	An income stream that commenced prior to 1 July 2017 Go to question 13.												
	An income stream that commenced on or after 1 July 2017 Go to question 13.												
	A limited recourse borrowing arrangement repayment Go to question 13.												
	A different transfer balance cap event Go to question 14.												
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16												
Tra	ansfer balance cap event												
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO.												
	A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.												
	Event type: Commutation authority – commuted in full												
	Commutation authority – commuted in part												
	Commutation authority – deceased												
	Commutation authority – defined benefit												
	Go to Event details on the next page.												
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment												
10	A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.												
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.												
	Event type:												
	Super income stream												
	Reversionary income stream												
	LRBA repayment												
14	Other transfer balance cap event												
	Any other transfer balance cap event.												
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.												
	Event type: Member commutation												
	Income stream stops being in retirement phase												
	Structured settlement – post 1 July 2017												

15 Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to tac poss. Authorists purchased from the complete this question to provide information regarding the total super balance of a member. Refer to tac poss. Authorists purchased from the calculate your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. Event type: Accumulation phase value Retirement phase value (30 June 2018 only) 16 Concessional contributions Information regarding the notional taxed contributions of a member. ① Only use this event type if you are reporting information for your member's notional taxed contributions. Event type: Uneapped notional taxed contributions (from 2017–18 financial year onwards) Event details ② You must complete C17 and C18 for each event reported with the exception of Commutation authority (decessed) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date ③ You was responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) ④ Only complete this question if the Appending event type is Commutation authority - commuted in full or Commutation authority - commuted in part. If unknown leave this question blank. No ② Yes Section E-4: Member account details ④ Only contain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question blank. No ③ Yes ③ Section E-4: Member account closed? No ③ Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number ② Member account number ② Member account number	Ot	her information
Refer to ato, gov. autrotals, perhalence for more information on Total super balance.	15	Total super balance
Levent type: Accumulation phase value		
Accumulation phase value Retirement phase value (30 June 2018 only) 16 Concessional contributions Information regarding the notional taxed contributions of a member. ① Only use this event type if you are reporting information for your member's notional taxed contributions. Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details ① You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date		used to calculate your member's total super balance and is only required from 30 June 2018.
Information regarding the notional taxed contributions of a member. Decided Property Uses this event type if you are reporting information for your member's notional taxed contributions. Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details Vou must complete 017 and 018 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. Teffective date Section to the super system) Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream in or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 To apped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream or or after 1 July 2017		
Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details Vou must complete 017 and 018 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. **Ver** **Ver** **In **In **Ver** 19 If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) **Only complete this question if the **Reporting event type is Commutation authority - commuted in full or Commutation authority - commuted in part. If unknown leave this question blank. **No Yes ** **Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. **OMember account type** **Account-based income stream ** **Capped defined benefit income stream just before 1 July 2017 ** **Market-linked capped defined benefit income stream on or after 1 July 2017 ** **Capped defined benefit income stream on or after 1 July 2017 ** **Unique superannuation identifier (USI)** If you don't have a USI leave this question blank. **Description** **Member client identifier (number)**	16	
Uncapped notional taxed contributions (from 2017–18 financial year onwards) Vou must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. The effective date		Only use this event type if you are reporting information for your member's notional taxed contributions.
You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date		
commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date	Ev	ent details
17 Effective date	•	commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section.
19 If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details ① Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. 20 Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 23 Member account identifier (number)	17	
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21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 24 Member client identifier (number)		Market-linked capped defined benefit income stream just before 1 July 2017
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22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank 23 Member account number 24 Member client identifier (number)	21	Is the account closed?
23 Member account number 24 Member client identifier (number)		No Yes Yes
23 Member account number 24 Member client identifier (number)	22	• • •
24 Member client identifier (number)		
, ,	23	Member account number
, ,		
If you don't have a member client identifier leave this question blank	24	Member client identifier (number) If you don't have a member client identifier leave this question blank

Sec	ction F: Third party details	
(You only need to complete Section F if the <i>Reporting event type</i> is Child death benefit income stream or Child reversionary income stream . Otherwise leave Section F blank. You must complete this section with the deceased person's details.	
25	Tax file number (TFN)	
(You don't have to provide the TFN to us. However, if you do, it will help us identify the third party correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy	
26 I	Name	
Family	y name	
First g	given name Other given names	
27	Date of birth Day / Month / Year / Year	

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Section G: Declarations
Complete the declaration that applies to you. Print your full name then sign and date the declaration.
Before you sign the declaration, check that you have provided true and correct information. Penalties may be imposed for giving false or misleading information.
Trustee, director or authorised officer declaration Complete this declaration if you are the trustee, director or authorised officer of the super provider. I declare that the information contained in the statement is true and correct.
Name HELEN DOWNEY CUK
Business hours phone number (include area code) 0 7 3 2 5 6 8 5 2 8
Trustee, director or authorised officer signature
Hetent owney Juk 09/03/2023 Date Day Month Year Date Day / Day Month / Year
OR
Authorised representative declaration Complete this declaration if you are an authorised representative of the super provider or life insurance company. I declare that: I have prepared the statement with the information supplied by the super provider or life insurance company I have received a declaration made by the super provider or life insurance company that the information provided to me for the preparation of this statement is true and correct I am authorised by the super provider or life insurance company to give the information in the statement to the ATO.
Name
Business hours phone number (include area code)
Authorised representative signature
Date Day Month Year Vear
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