

Rollover Benefits Statement

Section A :- Receiving fund

THIS FORM DOES NOT HAVE TO BE INCLUDED
IN A TAX RETURN

COOLCARKNEE SUPERANNUATION FUND
79 Fongeo Dr
POINT COOK VIC 3030

ORIGINAL

Australian business number (ABN) 21 935 505 753

Unique Superannuation Identifier
(USI)

Member client identifier

Section B :- Member's details

Tax File Number (TFN) 857 873 018

Full Name

Title Mr

Family name Kulkarni

First given name Amith

Other given names Kumar

Postal Address 79 Fongeo Dr
POINT COOK VIC 3030

Date of birth 03/07/1980

Sex (M/F) M

Daytime Phone No.

Email Address

Section C :- Rollover transaction details

Service period start date 12/04/2007

Tax components:

Tax-free component \$886.34

KiwiSaver tax-free component \$0.00

Taxable component:

Element taxed in the fund \$143,153.35

Element untaxed in the fund \$0.00

TOTAL Tax Components \$144,039.69

Preservation amounts:

Preserved amount \$144,039.69

KiwiSaver preserved amount \$0.00

Restricted non-preserved amount \$0.00

Unrestricted non-preserved amount \$0.00

TOTAL Preservation Amounts \$144,039.69

Investor No: M05046382

Section D :- Non-complying funds

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

\$0.00

Section E :- Transferring fund

Fund ABN

39 827 542 991

Your fund name

SuperWrap Personal Super Plan

Contact Name

Kathy Vincent



Date

09/09/2020

Telephone number

1300 657 010

Email Address

superwrap@investorwrap.com.au

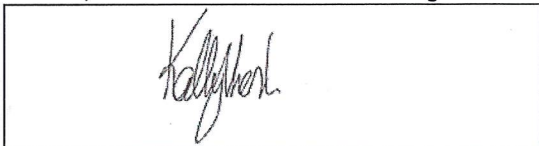
Section F :- Declaration

I declare that the information contained in the statement is true and correct.

Name (BLOCK LETTERS)

KATHY VINCENT

Trustee, director or authorised officer signature



DATE

09/09/2020

OR

AUTHORISED REPRESENTATIVE DECLARATION:

Complete this declaration if you are an authorised representative of the superannuation fund or other provider shown in section E.

I declare that:

- I have prepared the statement with the information supplied by the superannuation provider
- I have received a declaration made by the superannuation provider that the information provided to me for the preparation of this statement is true and correct
- I am authorised by the superannuation provider to give the information in the statement to the ATO

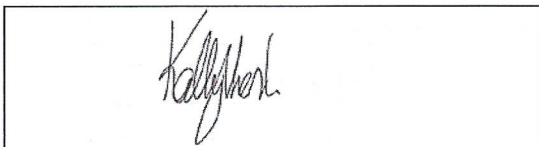
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Tax Agent number

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Unique Superannuation Identifier
(USI)

Member client identifier

Section B :- Member's details

Tax File Number (TFN)

856 214 565

Full Name

Title

Mrs

Family name

Kulkarni

First given name

Udaya

Other given names

Postal Address

79 Fongeo Dr
POINT COOK VIC 3030

Date of birth

22/05/1981

Sex (M/F)

F

Daytime Phone No.

Email Address

Section C :- Rollover transaction details

Service period start date

20/01/2007

Tax components:

Tax-free component

\$7.72

KiwiSaver tax-free component

\$0.00

Taxable component:

Element taxed in the fund

\$133,717.45

Element untaxed in the fund

\$0.00

TOTAL Tax Components

\$133,725.17

Preservation amounts:

Preserved amount

\$133,725.17

KiwiSaver preserved amount

\$0.00

Restricted non-preserved amount

\$0.00

Unrestricted non-preserved amount

\$0.00

TOTAL Preservation Amounts

\$133,725.17

Investor No: M05044416

Section D :- Non-complying funds

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

\$0.00

Section E :- Transferring fund

Fund ABN

39 827 542 991

Your fund name

SuperWrap Personal Super Plan

Contact Name

Kathy Vincent



Date

09/09/2020

Telephone number

1300 657 010

Email Address

superwrap@investorwrap.com.au

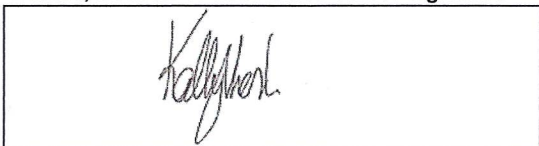
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DATE

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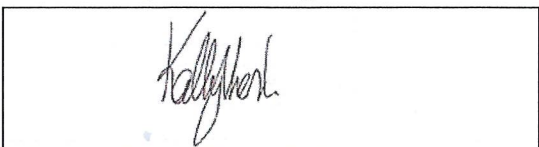
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Tax Agent number

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Unique Superannuation Identifier
(USI)

Member client identifier

Section B :- Member's details

Tax File Number (TFN)

Provided

Full Name

Title

Mrs

Family name

Kulkarni

First given name

Udaya

Other given names

Postal Address

79 Fongeo Dr
POINT COOK VIC 3030

Date of birth

22/05/1981

Sex (M/F)

F

Daytime Phone No.

Email Address

Section C :- Rollover transaction details

Service period start date

20/01/2007

Tax components:

Preservation amounts:

Tax-free component

\$0.00

Preserved amount

\$523.70

KiwiSaver tax-free component

\$0.00

KiwiSaver preserved amount

\$0.00

Taxable component:

Element taxed in the fund

\$523.70

Restricted non-preserved amount

\$0.00

Element untaxed in the fund

\$0.00

Unrestricted non-preserved amount

\$0.00

TOTAL Tax Components

\$523.70

TOTAL Preservation Amounts

\$523.70

Section D :- Non-complying funds

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

Section E :- Transferring fund

Fund ABN
Your fund name
Contact Name
 Date
Telephone number
Email Address

Section F :- Declaration

I declare that the information contained in the statement is true and correct.

Name (BLOCK LETTERS)

Trustee, director or authorised officer signature
 DATE

OR

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Name (BLOCK LETTERS)
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Authorised representative signature


Tax Agent number