

Mercer Superannuation (Australia) Limited GPO Box 4303 Melbourne Vic 3001 mercersuper.com

23 June 2022

Private & Confidential

Mr N Petersen 12 Robina Drive BUNDABERG QLD 4670

ARC Super Plan, a plan in the Mercer Super Trust Membership Number: 21089

Dear Mr Petersen

We have paid your benefit as you requested.

For your information and records we have enclosed:

- A Termination Statement detailing the calculation of your superannuation benefit.
- A copy of the Rollover Benefits Statement(s) which details the information sent to your rollover institution(s).

In addition, we have sent:

• The amount of \$60,665.14, and the information detailed in the Rollover Benefits Statement for your rollover to The Petersen Family Super Fund.

Details of your benefit

Please check the details on your Termination Statement carefully. If you believe there are any errors, please contact the Helpline on 1800 682 525.

MySuper Dashboard

The latest Product Dashboard for the Plan's MySuper product can be found at http://mercersupertrust.com/documents.

If you have any questions or need any assistance, please call us on 1800 682 525 and a team member will help you.

Yours sincerely Mercer Super

Helpline: 1800 682 525 Website: mercersuper.com

Termination statement at 23 June 2022 ARC Super Plan

a plan in the Mercer Super Trust

Issued by Mercer Superannuation (Australia) Limited (MSAL) ABN 79 004 717 533, AFSL 235906 as trustee of the Mercer Super Trust ABN 19 905 422 981

Personal details for Neil John Petersen

| Age | 52 | Membership number | 21089 |
|-----------------------|--------------------|---------------------|--------------|
| Eligible service date | 1 February 1992 | Date of termination | 21 June 2022 |
| Date joined fund | 1 June 2021 | Date of payment | 23 June 2022 |
| Benefit type | Withdrawal Benefit | | |
| Unit price date | 21 June 2022 | | |

Your super benefit

Your super benefit (subject to preservation) is equal to your super account balance, and is made up of the following components (see notes on 'Understanding your termination statement' for definitions):

| Preserved Portion | \$60,665.14 |
|------------------------------------|-------------|
| Restricted Non-preserved Portion | \$0.00 |
| Unrestricted Non-preserved Portion | \$0.00 |
| Total Super Benefit | \$60,665.14 |

For comparison, had you left the Plan on 1 July 2021, your super benefit would have been \$65,870,28,

Your death benefit as at 1 July 2021 was \$65,870.28. Of this amount, \$0.00 was insured with the Plan's insurer.

Your death insurance cover (if any) will continue until you advise in writing that you no longer wish to receive cover,

Your total and permanent disablement benefit as at 1 July 2021 was \$65,870,28. Of this amount, \$0.00 was insured with the Plan's insurer.

Your total and permanent disablement insurance cover (if any) will continue until you advise in writing that you no longer wish to receive cover.

Account details for the period 1 July 2021 to 21 June 2022^

| | Super Account |
|-------------------|---------------|
| Opening Balance | \$65,870.28 |
| Contributions tax | \$3.10 |
| Member fee | -\$30.85 |
| Earnings | -\$5,177.39 |
| Closing Balance | \$60,665.14 |

^ For full transaction details (if any), refer to the section 'Details of your super account transactions'.

Your super account investment summary at 21 June 2022

The investment earnings on your super account are based on the number of units held and the movement in unit prices. See below for your super account investment summary including the unit prices to determine your super benefit. Please note there may be a slight variance in the above calculation due to rounding.

| Investment option (s) | Units | Unit price | Value |
|-----------------------|-------------|------------|-------------|
| ARC Growth | 64640.53480 | .93850 | \$60,665.14 |
| Total | | | \$60,665.14 |

Percentage change in unit prices for the period* 30 June 2021 to 21 June 2022

This table shows how unit prices have changed since your last statement. Note that past performance is not a reliable indicator of future performance.

| Investment option (s) | % change |
|---|-----------|
| ARC Australian Shares | -6.20391 |
| ARC Cash | -0.58034 |
| ARC Conservative Growth | -4.65462 |
| ARC Defensive | -3.40501 |
| ARC Growth | -7.86373 |
| ARC High Growth | -8.95390 |
| ARC Moderate Growth | -6.81930 |
| Mercer Australian Shares | -5.86742 |
| Mercer Cash | -0.36231 |
| Mercer Conservative Growth | -4.08343 |
| Mercer Diversified Shares | -8.40912 |
| Mercer Enhanced Passive Conservative Growth | -6.73140 |
| Mercer Enhanced Passive Growth | -7.66196 |
| Mercer Fixed Interest | -10.78066 |
| Mercer Growth | -5.40112 |
| Mercer High Growth | -6.38076 |
| Mercer International Shares | -9.39205 |
| Mercer International Shares - Hedged | -13.37956 |
| Mercer Moderate Growth | -4.79904 |
| Mercer Passive Australian Listed Property | -12.13732 |
| Mercer Passive Australian Shares | -5.51002 |
| Mercer Passive International Shares | -7.44633 |
| Mercer Property | -0,22495 |
| Mercer Select Growth | -4.39981 |
| Mercer Smartpath-1900 to 1928 | -5.24948 |
| Mercer Smartpath-1929 to 1933 | -5.13100 |
| Mercer Smartpath-1934 to 1938 | -5.13946 |
| Mercer Smartpath-1939 to 1943 | -5.14024 |
| Mercer Smartpath-1944 to 1948 | -5.07285 |
| Mercer Smartpath-1949 to 1953 | -5.11261 |
| Mercer Smartpath-1954 to 1958 | -4.85159 |
| Mercer Smartpath-1959 to 1963 | -5.45719 |
| Mercer Smartpath-1964 to 1968 | -6.02722 |
| Mercer Smartpath-1969 to 1973 | -6.50106 |
| Mercer Smartpath-1974 to 1978 | -6.55976 |
| Mercer Smartpath-1979 to 1983 | -6.60689 |
| Mercer Smartpath-1984 to 1988 | -6.67293 |
| Mercer Smartpath-1989 to 1993 | -6.80511 |
| Mercer Smartpath-1994 to 1998 | -6.76019 |
| Mercer Smartpath-1999 to 2003 | -6.67343 |
| Mercer Smartpath-2004 to 2008 | -6.88740 |
| Mercer Sustainable Plus Australian Shares | -7.46577 |
| Mercer Sustainable Plus Conservative Growth | -4.46496 |

ARC Super Plan - Termination Statement Member Number 21089 – Page 2

Low balance fee refund:

From 1 July 2021, if your account balance is less than \$6,000 at the end of the Plan's financial year, the total combined amount of administration fees, investment fees and indirect costs charged to you for the year is capped at 3% of the account balance. Any amount charged in excess of that cap must be refunded. For exits the cap applies to the relevant fees since 1 July 2021 and is reduced based on the proportion of the year from 1 July 2021 to your date of exit. Any refund will be shown in the transaction listing and has been deducted in the calculation of the amount of *Fees deducted directly from your account* shown above.

Income tax and its effect on fees:

Tax is payable on investment earnings of the Plan at a maximum rate of 15%. However, as the Plan is allowed a tax deduction in respect of certain fees and costs, the rate of tax actually payable by the Plan may be less than 15%. The benefit of any income tax deductions is passed on to members, either directly or indirectly when the Trustee determines earnings or by meeting other costs incurred by the Plan.

Understanding your termination statement

Accessing your super

The Government has placed restrictions on when you can access your super.

The **restricted non-preserved** amount (if any) is the part of your benefit that is payable in cash on ceasing employment or upon attaining age 65. Please note that this amount may not be payable in cash in these circumstances if you are a temporary resident of Australia. More details on the conditions of release for temporary residents can be found below.

The **unrestricted non-preserved** amount (if any) is the part of your benefit that is payable in cash at any time.

The **preserved** amount is that part of your benefit which by law must be kept in a superannuation fund or other approved arrangement until you meet one of the conditions set down by the Government:

These include where you:

- leave your employer at or after age 60, or
- retire permanently from the workforce at or after your preservation age (see below), or
- attain age 65 (conditions apply), or
- become permanently disabled, terminally ill or die, or
- satisfy certain compassionate grounds or financial hardship criteria as specified by legislation, or
- leave your employer and your total benefit is under \$200 (and you are not a temporary resident).
- qualify for a release under the First Home Super Saver Scheme...

Note, the above conditions of release do not apply to temporary residents. If you are not an Australian or New Zealand citizen or an Australian permanent resident, a condition of release may only be met if you become permanently disabled, terminally ill or die or on departing Australia and cancellation or expiry of your visa.

Your preservation age is worked out as follows:

| Date of Birth | Preservation Age |
|----------------------------|------------------|
| After 30 June 1964 | 60 |
| 1 July 1963 – 30 June 1964 | 59 |
| 1 July 1962 – 30 June 1963 | 58 |
| 1 July 1961 – 30 June 1962 | 57 |
| 1 July 1960 - 30 June 1961 | 56 |
| Before 1 July 1960 | 55 |

Superannuation surcharge

For higher income earners there has been an additional tax, known as surcharge, on certain superannuation contributions and eligible termination payments paid by an employer. The surcharge has been removed on superannuation contributions made on or after 1 July 2005 and eligible termination payments made by an employer on or after 1 July 2005.

The surcharge continues to apply in respect of the period up to 30 June 2005. This means that the Australian Taxation Office must still determine whether the surcharge tax is payable in respect of you and issue an assessment to the Trustee. A copy of this assessment is also sent to you.

If the Trustee has received a surcharge assessment from the Australian Taxation Office for you since the last reporting period, this assessment is shown on your statement. Your benefits as shown on your statement have been reduced to take account of your total surcharge liability since joining the Plan.

If the Trustee receives a surcharge assessment in respect of your membership after you have left the Plan but before your benefit is transferred out or paid to you, the benefit actually payable to you will also be reduced to take account of this assessment.

Any surcharge assessment received after you have left the Plan and your benefit has been paid will be returned to the Australian Taxation Office. The Australian Taxation Office will either forward it to the Plan to which your benefit was paid, or to you if your benefit was paid directly to you.

If you have any queries about the surcharge information reported to the Taxation Office, or about your surcharge liability please call the Helpline on 1800 682 525.

Enquiries and additional information

If you need more information to understand your entitlements, fees, charges to or expenses debited from your account please contact the Helpline on 1800 682 525. The Trustee has an obligation to provide you with any information you reasonably require to understand your entitlements.

For most enquiries we'll be able to help you over the phone. If not, you may be asked to put your enquiry in writing and provide a contact address for the reply. Written enquiries will generally be answered within 28 days.

The Plan also has a process in place to help resolve any complaints you may have. We will acknowledge your complaint as soon as practicable. We will provide you a response no later than 45 calendar days after receiving your complaint, unless another timeframe is allowed or required under the relevant legislation.

If we are unable to provide you a response within this timeframe, we will provide you a delay notification advising you the reasons for the delay, as well as your rights to complain to the Australian Financial Complaints Authority (AFCA). You should also write to the Complaints Officer if you would like more information about the process for handling any complaints you may have.

The address for the Complaints Officer for Mercer Super Trust is:

The Complaints Officer Mercer Super Trust GPO Box 4303 Melbourne VIC 3001

Telephone number: 1800 682 525

If you are not happy with how your complaint has been handled, you may refer your complaint to the Australian Financial Complaints Authority (AFCA).

Complaints relating to a death benefit payment must be submitted within 28 days of receiving the Trustee's decision. Complaints about disability benefits must be submitted within 2 years. To protect your interests, other complaints must generally be submitted within 12 months.

AFCA may be able to assist you to resolve your complaint, but only after you have followed the process set out above.

If AFCA accepts your complaint, it will try and help you and the Trustee reach a mutual agreement through conciliation. If conciliation is unsuccessful, the complaint is referred to AFCA for a determination that is binding.

For more details about referring a complaint to AFCA, requirements and time limits that may apply, contact AFCA at:

Australian Financial Complaints Authority GPO Box 3 Melbourne Vic 3001

Telephone 1800 931 678 Web. <u>www.afca.org.au</u> Email <u>info@afca.org.au</u>

Rollover benefits statement

Section A: Receiving fund

| Name and Postal Address | Australian Business Number (ABN) |
|--------------------------------|--|
| The Petersen Family Super Fund | 61840817122 |
| | Unique superannuation identifier (USI) |
| | Member client identifier |
| | SMSF1 |
| | |

Section B: Member's details

| Tax File Number (TFN) | 158638107 | | | | |
|----------------------------|---------------------------------------|-------|-----|---------|---|
| Full Name | · · · · · · · · · · · · · · · · · · · | | | | |
| Family Name | Petersen | | | | |
| First Given Name | Neil | | | | |
| Other Given Names | John | | | | |
| Residential Address | | | | | |
| Street Address | 12 Robina Drive | | | | |
| Suburb/Town/Locality | BUNDABERG | State | QLD | Postcod | 4670 |
| Country | | 2 | | Se | ۲ <u>ــــــــــــــــــــــــــــــــــــ</u> |
| Date of Birth | 14/11/1969 | | | Mal | e X |
| Email Address | | | | Femal | |
| Daytime phone number | 522-886 | | | | |

Section C: Rollover transaction details

| 1 February 1992 |
|-----------------|
| |
| \$133.17 |
| \$0.00 |
| |
| \$60,531.97 |
| \$0.00 |
| \$60,665.14 |
| |

Preservation Amounts:

| Preserved amount | \$60,665.14 |
|----------------------------|-------------|
| KiwiSaver preserved amount | \$0.00 |
| Restricted non-preserved | \$0.00 |
| Unrestricted non-preserved | \$0.00 |
| Total | \$60,665.14 |

Section D: Non-complying funds

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

Section E: Transferring fund

| Fund's ABN | 19905422981 | |
|----------------------|--------------------|--|
| Fund's name | Mercer Super Trust | |
| Contact name | the Helpline | |
| Email address | | |
| Daytime phone number | 1800 682 525 | |

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Section F: Authorised Representative Declaration

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

| Name | Craig Rice | |
|-------------------------------------|--------------|--|
| Authorised representative signature | CraigRice | |
| Date | 23 June 2022 | |

•

| Mercer Sustainable Plus Global Shares | -12.33633 |
|---|-----------|
| Mercer Sustainable Plus Growth | -6.57756 |
| Mercer Sustainable Plus High Growth | -7.60095 |
| Mercer Sustainable Plus Moderate Growth | -6.09282 |
| Mercer Sustainable Plus Shares | -11.30775 |

These returns are not the same as your returns in any particular investment option as the actual rate of return for your investment will depend on the timing of contributions and other transactions.

* The period above may not apply to an investment if the commencement date of the investment occurred after 30 June 2021, or the closing date of the investment occurred earlier than 21 June 2022.

Details of your super account transactions

This section shows details of the contributions, withdrawals, fees and charges made to your account for the period ending 21 June 2022.

Contributions

| Date | Transaction description | Gross | Тах | Net |
|------------|-------------------------|--------|---------|---------|
| 21-06-2022 | Tax adjustment | \$0.00 | -\$1.54 | -\$1.54 |
| Total | | \$0.00 | -\$1.54 | -\$1.54 |

Tax adjustment. Tax is payable on taxable contributions, and certain fees and premiums may be deductible, thus reducing the tax payable.

In some cases the timing and application of tax is such that the Plan's administration system does not allocate tax to particular transactions. In such cases the proper tax treatment is achieved by way of a special tax adjustment.

Administration Fees

| Date | Transaction description | Gross | Тах | Net |
|------------|--|---------|---------|---------|
| 31-07-2021 | ADMIN FEE | \$4.16 | -\$0.62 | \$3.54 |
| 31-08-2021 | ADMIN FEE | \$4.16 | -\$0.62 | \$3.54 |
| 30-09-2021 | ADMIN FEE | \$4.16 | -\$0.62 | \$3.54 |
| 31-10-2021 | ADMIN FEE | \$4.16 | -\$0.62 | \$3.54 |
| 30-11-2021 | ADMIN FEE | \$4.16 | -\$0.62 | \$3.54 |
| 31-12-2021 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 31-01-2022 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 28-02-2022 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 31-03-2022 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 30-04-2022 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 31-05-2022 | ADMIN FEE | \$1.50 | -\$0.23 | \$1.27 |
| 21-06-2022 | ADMIN FEE | \$1.05 | -\$0.16 | \$0.89 |
| Total | and the second | \$30.85 | -\$4.64 | \$26.21 |

Concessional and Non-concessional contribution amounts

The total concessional contributions* received in respect of you for the financial year ending 30 June 2022 were \$0.00. (This amount includes any insurance premiums or other expenses paid by your employer, if applicable, on your behalf.)

The total non-concessional contributions* received in respect of you for the financial year ending 30 June 2022 were \$0.00.

* The amounts above are based on the information the Plan holds on your records as at 30 June 2022, and may differ from the figures to be reported to the Australian Taxation Office if updated information is subsequently received by the Plan. An annual cap applies to the amount of concessional contributions made to superannuation that are taxed at concessional rates. Caps also apply to the amount of non-concessional contributions. For more information about the caps, the contributions that count towards the caps and what it means if your contributions exceed the caps call the Helpline.

Division 293 tax

Division 293 tax is an additional tax on contributions for high income earners. It will be charged at 15% on some or all of an individual's concessional contributions for individuals on incomes (as defined for this purpose) above the income threshold. The Division 293 contributions reported for you for the financial year ending 30 June 2022 are the contributions shown above. For further information on Division 293 tax and who it affects, please refer to the ATO website at www.ato.gov.au.

Continuation option

When you cease employment or exit the Plan (by, for example, exercising Choice of Fund), you *may* be given continuation options which will allow you to purchase insurance cover for an amount up to the insured portion of the benefits which you had before you ceased employment or exited the Plan. A continuation option is not available for any non-insured portion of your benefits.

Details of your Continuation Option are as follows:

Death cover - Your continuation option for death cover is available for a period of 60 days after the date you ceased employment or exited the Plan.

Total and Permanent Disablement cover – Your continuation option for total and permanent disablement cover is available for a period of 60 days after the date you ceased employment or exited the Plan.

Income Protection cover – Your continuation option for income protection cover is available for a period of 60 days after the date you ceased employment or exited the Plan.

A completed application form must be received by the insurer within the availability period. If this period has expired, the Continuation Option will, generally, no longer be available.

The continuation option is available subject to you meeting the insurer's standard terms and conditions for a continuation option, including age limitations. The following are some instances where a continuation option may not be available:

- If you are working, travelling or residing overseas (according to the risk assessment of the area determined by the insurer at the time of the application).
- If you are not an Australian Citizen or not a Permanent Resident of Australia.
- If you have made, or intend to lodge, a claim for Total & Permanent Disability.
- If you have ceased employment due to ill health or injury.
- If you have joined, or are joining the Armed Forces.
- If you have previously exercised a Continuation Option with the same insurer group.
- If you are not suitably engaged, or gainfully employed on a permanent full time basis, disability insurance, where provided, may not be available as a Continuation Option. The availability and limits will be subject to your circumstances at time of application.
- If your occupation, pursuits, pastimes etc. would not normally be acceptable by the insurer.

If you wish to apply for insurance cover under your continuation option (if applicable), or obtain further details, please **immediately telephone** the Helpline on 1800 682 525.

Fees and Costs Summary from 1 July 2021 to 21 June 2022

We are required to provide you with information about fees and costs, as outlined below. If you have any questions about the information shown please contact the Helpline on 1800 682 525.

Fees deducted directly from your account

This amount has been deducted directly from your account (reflected in the transactions listed on this statement).

Fees and costs deducted from your investment

This approximate amount has been deducted from your investment and covers amounts that have reduced the return on your investment and that are not reflected as transactions listed on this statement or in the Additional explanation of fees and costs.

TOTAL FEES AND COSTS YOU PAID

This approximate amount includes all the fees and costs that affected your investment during the period.

Additional explanation of fees and costs

Fees deducted directly from your account represent any fees and insurance premiums deducted directly from your account (excluding any rebates that may apply to Fees and costs deducted from your investment). For more information, refer to your account transactions provided earlier in this statement.

Fees and costs deducted from your investment represent the amounts of fees and other costs that have been deducted from your investment (net of any fee rebates that may apply to you). This is generally done by adjusting the unit price and/or the declared earning rate. The amount shown is an approximate amount allocated to you. This amount does not include any fees deducted directly from your account.

For more information about the fees and costs deducted from your investment, please refer to your Product Disclosure Statement (and Your Plan Guide if applicable) together with any member materials you have received since joining your Plan.

Total fees and costs you paid are the total amount of the Fees deducted directly from your account and Fees and costs deducted from your investment shown above.

ARC Super Plan - Termination Statement Member Number 21089 -- Page 4

\$869.94

\$30.85

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Request for rollover of whole balance of super benefits between funds

When to use this form

Complete this form to request the rollover (or transfer) of the whole balance of your super benefits between funds, in accordance with the *Superannuation Industry* (*Supervision*) *Act* 1993.

Important

This form cannot be used to:

transfer part of the balance of your super benefits

- change the fund that your employer pays your super contributions into – the Standard choice form must be used
- transfer benefits if you don't know where your super is
 transfer benefits from multiple funds a separate rollover
- form must be completed for each fund open a super account
- open a super account
- transfer benefits under certain conditions or circumstances
 for example, if a super agreement under the Family Law Act 1975 is in place.

When completing this form

- Print clearly in BLOCK LETTERS.
- Refer to Request for rollover of whole of balance of super benefits between funds – Instructions (QC19260) on ato.gov.au for detailed instructions and guidance.
 - * Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

Transfers to self-managed super funds (SMSFs)

Super funds (including SMSFs) must use SuperStream to roll over your super benefits. This means your SMSF will need:

- an electronic service address
- an Australian business number (ABN)
- to ensure the SMSF details are up to date, including bank account details.

SMSF trustees may wish to consider appointing a professional to assist them in meeting these requirements.

The trustee of your **FROM** fund may request further information from you to help confirm your identity. You may also be asked to provide information about the SMSF bank account (to confirm the destination of the payment). This information assists to manage security and fraud risk in the rollover transaction.

If this information is requested, the **FROM** fund may not be able to process your request until the information is provided.

Where do I send the form?

Residential address

Send your completed and signed form, together with any documents required by your fund, to your transferring **FROM** fund.

For more information about super, visit the:

- Australian Securities & Investments Commission (ASIC) website at moneysmart.gov.au
- ATO website at ato.gov.au/super

For more information about this form, phone the ATO on **13 10 20**.

Personal details

Proof of identity

| The trustee of your FROM fund may request further information/evidence from you to help confirm your identity. | *Address 12 ROBINA DRIVE |
|--|---|
| Title: Mr X Mrs Miss Ms Other *Family name PETERSEN *Given names NEIL | *Suburb BUNDABERG *State/territory QLD V*Postcode 4670 |
| Other/previous JOHN names *Date of birth | Previous address If you know that the address held by your FROM fund is different to your current residential address, give details below. |
| Tax file number 158638 107 Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but | Suburb |
| there may be tax consequences. *Gender: Male X Female Indeterminate Contact phone number 407139652 | State/territory Postcode |

Fund details

| FROM (Tran | sferring f | und) | To (Receiving fund) |
|------------------------------------|---------------------|------------------------------|---|
| *Fund name | MERCE | | *Fund name |
| Fund phone nu | umber | 1800682525 | Fund phone number |
| *Membership (number (non- | or account SMSF) | 21089 | *Membership or account number (non-SMSF) |
| *Australian bus number (ABN) | iness | 79004717533 | *Australian business number (ABN) |
| *Unique supera identifier (non- | annuation SMSF) | 19905422981318 | *Unique superannuation identifier (non-SMSF) |
| | | er death benefit? Yes 🗌 No 🗙 | |

For SMSFs only

| FROM (Transferring fund) | To (Receiving f | und) |
|--|---------------------|--------------------------------|
| Account name | *Account name | THE PETERSEN FAMILY SUPER FUND |
| | A | ABN: 61840817122 |
| BSB | *BSB | 484799 |
| Account number | *Account number | 166167411 |
| Electronic service | *Electronic service | AUSPOSTSMSF |
| The trustee of your FROM fund may required information/evidence about the SMSF bacconfirm the payment destination. | uest further | |

Authorisation

By signing this form, you are:

- aware you may ask your superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on your benefits, and you have obtained or do not require such information
- requesting consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer
- discharging the superannuation provider of your transferring fund from all further liability in respect of the benefits paid and transferred to your receiving fund.
- By signing this form you are making the following declarations:
- I declare that the information is true and correct.
- Where the receiving fund is an SMSF, I confirm that I am a member, trustee or director of corporate trustee of the SMSF.

*Name (Print in BLOCK LETTERS)

NEIL PETERSEN

*Signature

Date

Day Month, Year

Super Fund Lookup



N

Australian Taxation Office

The Trustee for The Petersen Family Super Fund

| ABN details | |
|------------------|--|
| ABN: | 61 840 817 122 View record on ABN Lookup |
| ABN Status: | Active from 21 Jan 2016 |
| Fund type: | ATO Regulated Self-Managed Superannuation Fund |
| Contact details: | 12 ROBINA DR AVOCA QLD 4670 AUSTRALIA |
| Status: | Complying |

What does 'Complying' mean?

- A 'Complying' SMSF:
- is a regulated fund
- is a resident of Australia, and
- has been issued with a Notice of compliance

APRA Funds

See the guidance issued by APRA for further assistance in managing transfers and rollovers to SMSFs. Use the ATO Business Portal to verify a person is a member of the SMSF before completing a transfer or rollover.

Superannuation guarantee payments

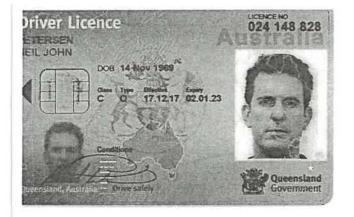
Contributions made to complying funds can qualify as Superannuation Guarantee (SG) payments. This record extract can be used to confirm this fund has been issued with a Notice of Compliance and is currently entitled to receive employer SG payments.

Tax rates

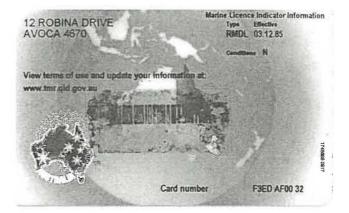
Complying funds that meet Superannuation Industry (Supervision) Act 1993 (SISA) standards qualify for concessional tax rates

Also refer to frequently asked questions

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This is to certify that this is a true copy of the original / copy / download which I have sighted. HE PEAG 7.6.22 Dale PK Signed. Reg No. 2 64 572 PETER HAMILT NOTERAN Name