

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

HOULDING SUPERANNUATION FUND

2 Postal address

15 TAUNTON STREET
PYMBLE NSW 2073

3 Australian business number (ABN) or withholder payer number

97453719746

4 Authorised contact person

NICHOLAS HULLAH

5 Daytime phone number

Section B: Member's details

6 Full name

Title MR

Family Name

HULLAH

First given name

Other given names

NICHOLAS

7 Postal address

15 TAUNTON STREET
PYMBLE NSW 2073

8 Date of birth

09/09/1944

Section C: Superannuation lump sum payment details**9 Lump sum payment is calculated to this date**

10/07/2020

10 Superannuation lump sum components

Taxable component

Taxed element \$ 35,246.75

Untaxed element \$

Tax-free component \$ 24,753.25

KiwiSaver tax-free component \$

Total amount \$ 60,000.00**11 Preservation amounts of the superannuation lump sum**

Preserved amount \$

Restricted non-preserved amount \$

Unrestricted non-preserved amount \$ 60,000.00

Total amount \$ 60,000.00

Section D: Superannuation provider's signature**12 Date the statement is issued to the member**

10 / 7 / 20

13 Member is to return statement by

10 / 7 / 20

14 Superannuation fund's, ADF's, RSA's or annuity provider's signature

Date

15 / 9 / 20

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)

3 Fund ABN

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

5 Member account number

6 Roll over an amount of:

Section G: Member's declaration

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

NICHOLAS HULLAH

Signature



Date

Give this completed statement to your super fund. You should 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 2021

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

HULLAH

Payee's given name(s)

NICHOLAS

Payee's address

15 TAUNTON STREET

PYMBLE NSW 2073

Date of birth

09/09/1944

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

10/07/2020

Payee's Tax File Number

136086443

Total Tax withheld

\$

Taxable component

Taxed element

35,246

Untaxed element

Tax free component

24,753

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

97453719746

Branch Number

Payer's Name

HOULDING SUPERANNUATION FUND

Signature of authorised person

Date

10/07/20

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97453719746

4 Authorised contact person

NICHOLAS HULLAH

5 Daytime phone number

Section B: Member's details

6 Full name

Title MR

Family Name

HULLAH

First given name

Other given names

NICHOLAS

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PYMBLE NSW 2073

8 Date of birth

09/09/1944

Section C: Superannuation lump sum payment details**9 Lump sum payment is calculated to this date**

23/09/2020

10 Superannuation lump sum components

Taxable component

Taxed element \$ 88,116.60

Untaxed element \$

Tax-free component \$ 61,883.40

KiwiSaver tax-free component \$

Total amount \$ 150,000.00**11 Preservation amounts of the superannuation lump sum**

Preserved amount \$

Restricted non-preserved amount \$

Unrestricted non-preserved amount \$ 150,000.00

Total amount \$ 150,000.00

Section D: Superannuation provider's signature**12 Date the statement is issued to the member**

23/9/20

13 Member is to return statement by

23/9/20

14 Superannuation fund's, ADF's, RSA's or annuity provider's signature

Date

23/9/20

Section E: Cash amount

1 Pay me a gross cash amount of: \$ 150,000.00

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.

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3 Fund ABN

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

5 Member account number

6 Roll over an amount of: \$

Section G: Member's declaration

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NICHOLAS HULLAH

Signature 

Date 23 19 20

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Payee's given name(s)

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Payee's address

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Date of birth

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Date of payment

23/09/2020

Payee's Tax File Number

136086443

Total Tax withheld

\$

Taxable component

Taxed element

88,116

Untaxed element

Tax free component

61,883

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

97453719746

Branch Number

Payer's Name

HOULDING SUPERANNUATION FUND

Signature of authorised person

Date

23/9/20