

PAYG payment summary – superannuation lump sum

You must complete all sections of this form. For help completing this form, visit our website at ato.gov.au/paymentsummaries

Payment summary for year ending 30 June 2022

If you are amending a payment summary you have already sent, place X in this box

Section A: Payee details

Tax file number PROVIDED

Surname or family name

TREMBATH

Given name(s)

BERNARD

PETER

Residential address

122/390 SIMPSONS ROAD

Suburb/town/locality

BARDON

State/territory

QLD

Postcode

4065

Date of birth (if known)

PROVIDED

Section B: Payment details

Date of payment 20/10/2021

TOTAL TAX WITHHELD \$

Taxable component

Taxed element

\$

Untaxed element

\$

Tax-free component

\$

Place an X in the appropriate box for each field below.

Is this payment a death benefit?

No

Yes

Type of death benefit

Trustee of deceased estate

or Non-dependant

Section C: Payer details

! You must also complete this section

Australian business number (ABN) or withholding payer number (WPN)

20273242642

Branch number

Name (use the same name that appears on your activity statement)

Privacy – For information about your privacy visit our website at ato.gov.au/privacy

DECLARATION – I declare that the information given on this form is complete and correct.

Signature of authorised person

Bernard Trembath

Bernard Trembath (Mar 29, 2023 16:08 GMT+10)

Date

Warning: This form has been designed to assist you to prepare the ATO's PAYG payment summary - Superannuation lump sum. This form cannot be lodged with the ATO.

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

2 Postal address

Suburb/town/locality

YATALA DC

State/territory

Postcode

3 Australian business number (ABN) or withholder payer number

20273242642

4 Authorised contact person

Title:

Family name

First given name

Other given names

5 Daytime phone number (include area code)

Section B: Member's details

6 Your full name

Title:

Family name

TREMBATH

First given name

Other given names

BERNARD

7 Current postal address

Suburb/town/locality

BARDON

State/territory

QLD

Postcode

4065

8 Date of birth PROVIDED

Section C: Superannuation lump sum payment details

9 Lump sum payment is calculated to this date

10 Superannuation lump sum components

Taxable component

Taxed element \$

Untaxed element \$

Tax-free component \$

Total amount \$

11 Preservation amounts of the superannuation lump sum

Preserved amount \$

Restricted non-preserved \$

Unrestricted non-preserved \$

Total amount \$

Section D: Superannuation provider's signature

12 Date the statement is issued to the member

13 Member is to return statement by

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

Date

PART 2 – MEMBER TO COMPLETE

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:

Suburb/town/locality

State/territory

Postcode

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.

Name (print in block letters)

Signature

Bernard Trembath

Bernard Trembath (Mar 29, 2023 16:08 GMT+10)

Date

! You should keep a copy of the statement for your records for a period of five years.