

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

HALL FAMILY SUPERFUND

2 Postal address

1 ROLAND AVENUE
WAHROONGA NSW 2076

3 Australian business number (ABN) or withholder payer number

53781095537

4 Authorised contact person

RAYMOND JOHN HALL

5 Daytime phone number

02 9487 4799

Section B: Member's details

6 Full name

Title MR

Family Name

HALL

First given name

Other given names

RAYMOND JOHN

7 Postal address

1 ROLAND AVENUE
WAHROONGA NSW 2076

8 Date of birth

06/03/1944

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

28/05/2021

10 Superannuation lump sum components

Taxable component

Taxed element \$ 1,830.00

Untaxed element \$

Tax-free component \$ 3,170.00

KiwiSaver tax-free component \$

Total amount \$ 5,000.00**11 Preservation amounts of the superannuation lump sum**

Preserved amount \$

Restricted non-preserved amount \$

Unrestricted non-preserved amount \$ 5,000.00

Total amount \$ 5,000.00

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

28/5/21

13 Member is to return statement by

28/5/21

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

Date

28/5/21

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

HALL

Payee's given name(s)

RAYMOND JOHN

Payee's address

1 ROLAND AVENUE

WAHROONGA NSW 2076

Date of birth

06/03/1944

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

28/05/2021

Payee's Tax File Number

125734870

Total Tax withheld

\$

Taxable component

Taxed element

1,830

Untaxed element

Tax free component

3,170

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

53781095537

Branch Number

Payer's Name

HALL FAMILY SUPERFUND

Signature of authorised person



Date

28/5/21

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.

RAYMOND JOHN
HALL

Signature



Date

Give this completed statement to your super fund. You should keep a copy for your records for a period of five years.

Superannuation lump sum pre-payment statement

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02 9487 4799

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06/03/1944

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

15/06/2021

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Taxable component

Taxed element \$ 1,830.00

Untaxed element \$

Tax-free component \$ 3,170.00

KiwiSaver tax-free component \$

Total amount \$ 5,000.00**11 Preservation amounts of the superannuation lump sum**

Preserved amount \$

Restricted non-preserved amount \$

Unrestricted non-preserved amount \$ 5,000.00

Total amount \$ 5,000.00

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

15/6/21

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15/6/21

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Date

15/6/21

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Untaxed element

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Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

53781095537

Branch Number

Payer's Name

HALL FAMILY SUPERFUND

Signature of authorised person

R. Hall

Date

15/6/21

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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	\$	27,447.00
Untaxed element	\$	
Tax-free component	\$	47,553.00
KiwiSaver tax-free component	\$	
Total amount	\$	75,000.00

11 Preservation amounts of the superannuation lump sum

Preserved amount	\$	
Restricted non-preserved amount	\$	
Unrestricted non-preserved amount	\$	75,000.00
Total amount	\$	75,000.00

Section D: Superannuation provider's signature

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Date

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Total Tax withheld

\$

Taxable component

Taxed element

27,447

Untaxed element

Tax free component

47,553

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

53781095537

Branch Number

Payer's Name

HALL FAMILY SUPERFUND

Signature of authorised person



Date

29/6/21

Section E: Cash amount

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Signature



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Section C: Superannuation lump sum payment details

9 Lump sum payment is calculated to this date

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10 Superannuation lump sum components

Taxable component

Taxed element	\$	58,554.00
Untaxed element	\$	
Tax-free component	\$	101,446.00
KiwiSaver tax-free component	\$	
Total amount	\$	160,000.00

11 Preservation amounts of the superannuation lump sum

Preserved amount	\$	
Restricted non-preserved amount	\$	
Unrestricted non-preserved amount	\$	160,000.00
Total amount	\$	160,000.00

Section D: Superannuation provider's signature

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P. Hall

Date 30/6/21

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Date of payment

30/06/2021

Payee's Tax File Number

125734870

Total Tax withheld

\$

Taxable component

Taxed element

58,554

Untaxed element

Tax free component

101,446

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payer Details

Payer's ABN or Withholder Payer Number

53781095537

Branch Number

Payer's Name

HALL FAMILY SUPERFUND

Signature of authorised person

R Hall

Date

30/6/21

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