

# 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

A & J SUPERANNUATION FUND

#### 2 Postal address

2 CUTHERO COURT

Suburb/town/locality

HIGHLAND PARK

State/territory

QLD

Postcode

4211

#### 3 Australian business number (ABN) or withholder payer number

72362001833

#### 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: MRS

Family name

COURTNEY-PRATT

First given name Other given names

JENNIFER

#### 7 Current postal address

2 CUTHERO COURT

Suburb/town/locality

HIGHLAND PARK

State/territory

QLD

Postcode

4211

#### 8 Date of birth

29 SEPTEMBER 1953

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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 \$

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** \$

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## 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

*Jennifer Courtney-Pratt*

Date

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

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# 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.

## Section A: Payee details

Tax file number

Surname or family name

COURTNEY-PRATT

Given name(s)

JENNIFER

Residential address

2 CUTHERO COURT

Suburb/town/locality

HIGHLAND PARK

State/territory

QLD

Postcode

4211

Date of birth (if known)

Day Month Year  
29 SEPTEMBER 1953

## Section B: Payment details

Date of payment

01 JUNE 2021

TOTAL TAX WITHHELD \$

Taxable component

Taxed element

\$

Untaxed element

\$

Tax-free component

\$ 3000.00

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)

72362001833

Branch number

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

A & J SUPERANNUATION FUND

Privacy – For information about your privacy visit our website at [ato.gov.au/privacy](http://ato.gov.au/privacy)

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

Signature of authorised person

Jennifer Courtney-Pratt

Date


18-03-2022

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](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61



# Signature Certificate

Reference number: UBESI-48OMQ-ZODAQ-DZI3H

Signer	Timestamp	Signature
<b>Jennifer Courtney-Pratt</b> Email: jennygoldwing@gmail.com		
Sent:	17 Mar 2022 23:30:15 UTC	IP address: 1.128.26.8
Viewed:	18 Mar 2022 03:02:56 UTC	Location: Brisbane, Australia
Signed:	18 Mar 2022 03:03:38 UTC	

Document completed by all parties on:  
18 Mar 2022 03:03:38 UTC

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