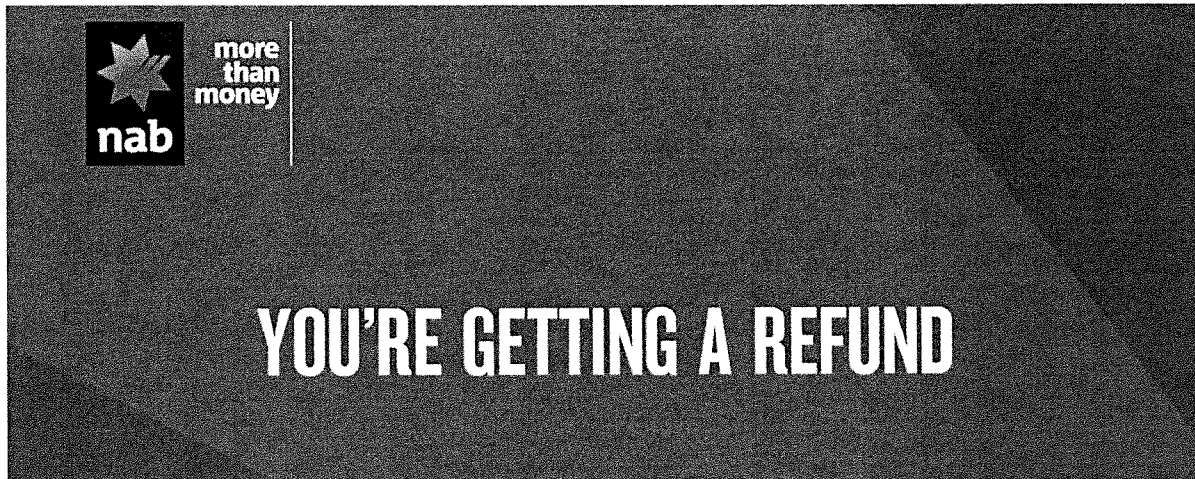


Lindsay Carter

From: NAB <nab@updates.nab.com.au>
Sent: Friday, 26 November 2021 9:58 AM
To: brian@whitney-family.net
Subject: You're getting a refund

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**Important information for BRIAN GRANT WHITNEY
AND LESLEY JOY ANDERSEN ATFT WHITNEY
ANDERSEN SUPERFUND,**

We're paying you \$21.05

Your Business Cheque Account ending in 7315 was incorrectly charged transaction fees of \$18.10 between July 2013 and March 2016.

We're sorry this happened.

Your refund of \$21.05 will be paid into your NAB account ending in 7315 by 10 December 2021.

Your refund details

As the refund may have tax implications, we've itemised these calculations for you.

Fee refund \$18.10

All eligible transaction fees charged in error.

Compensatory interest \$2.95

Interest paid as compensation for our error.

Total refund \$21.05

If you need more information on how your refund was calculated, please contact us on **1800 370 777**.

You should seek independent tax advice about how this payment could impact your tax situation.

The Australian Taxation Office has provided general guidance outlining that:

- a refund of an amount (such as a fee, or interest paid) will generally be subject to tax to the extent a tax deduction was originally claimed for the amount; and
- compensatory interest (if applicable) is also generally taxable.

We're here to help

If you have any questions or you'd like to discuss this refund, please:



call us on **1800 370 777** Monday to Friday 10am to 5pm AEST/AEDT; or



email us by clicking here and include your reference number 72970188-02-045537.

Thanks,
NAB

Any concerns?

We value your feedback and want to make sure problems are resolved quickly. If you're not happy with the outcome after speaking to us, you can contact the Australian Financial Complaints Authority (AFCA) at afca.org.au