

Super transfer balance account report

Who should complete this report?

Super providers and life insurance companies should complete this report when:

- there is a transfer balance account reporting requirement
- further information is required to calculate a member's total super balance
- further information is required to determine a member's concessional contributions amount
- incorrect information has previously been reported to us.

The obligation to report is on:

- the trustee of the fund for a super fund, including self-managed super funds (SMSFs) or an approved deposit fund (ADF)
- the retirement savings account (RSA) provider for an RSA
- a director of the life insurance company for a life insurance company.

Instructions

Follow the Super transfer balance account report instructions for assistance when completing this report.

You must complete and lodge separate reports for each member. If you have more than four events to report for a member you must lodge separate reports. However, if you are reporting a child death benefit income stream or a child reversionary income stream you can only report one event per report.

To cancel or update information already reported to us, you must cancel the original report. Ensure the "Yes" box in Section B is clearly marked and lodge the report exactly the same as the original event. A new report can then be lodged with the correct information.

Completing this report

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

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Place X in ALL applicable boxes.



| Se | ection A: Member details |
|-------|---|
| 1 | Tax file number (TFN) |
| | You don't have to provide the TFN to us. However, if you do, it will help us identify the member correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy |
| 2 | Name |
| Title | e: Mr Mrs Miss Ms Other Miss Ms Other |
| ran | my name Complement of the complement of the comp |
| | |
| First | t given name Other given names |
| | |
| | Day Month Year |
| 3 | Date of birth / / / / / / / / / / / / / / / / / / / |
| 4 | Current residential address |
| | |
| | |
| | |
| Sub | urb/town State/territory Postcode |
| | |
| Col | Intry if other than Australia (Australia only) (Australia only) |
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| Se | ection B: Cancellation |
| 5 | Are you cancelling a previous transfer balance account event? No Yes Yes Yes Complete this report exactly the same as the original event. If you previously reported multiple events you only need to include details of the event/s you wish to cancel. Refer to the instructions for more information on how to cancel a previous report. |
| Se 1 | ection C: Fund/Supplier/Provider details If you are an SMSF trustee completing this report for a member of your SMSF you may leave questions 6 and 7 blank. Intermediary/Supplier name |
| | |
| | |
| 7 | Australian business number (ABN) Your contact details are required in case we need to speak to you about details supplied on this report. Provide your contact details in Section G. |
| 8 | Fund/Provider name |
| | |
| 9 | Fund/Provider ABN |
| 10 | Fund/Provider TFN |
| | You don't have to provide the TFN to us. However, if you do, it will help us identify the fund/provider correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy |

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| Se | ection D-1: Event one |
| 0 | Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a second event in Section D-2. |
| 11 | Is the first event: |
| | A response to a commutation authority Go to question 12. |
| | An income stream that commenced prior to 1 July 2017 Go to question 13. |
| | An income stream that commenced on or after 1 July 2017 Go to question 13. |
| | A limited recourse borrowing arrangement repayment Go to question 13. |
| | A different transfer balance cap event Go to question 14. |
| | Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16 |
| Tra | ansfer balance cap event |
| 12 | Commutation authority An event that occurred in response to a commutation authority issued by the ATO. |
| | A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream. |
| | Event type: Commutation authority – commuted in full |
| | |
| | Commutation authority – commuted in part |
| | Commutation authority – deceased |
| | Commutation authority – defined benefit Go to Event details on the next page. |
| 10 | |
| 13 | Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment. |
| | If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report. |
| | Event type: Super income stream |
| | |
| | Reversionary income stream |
| | LRBA repayment |
| | If you select one of the below events you can only report one event in this report. Refer to the instructions for more information. Child death benefit income stream |
| | |
| | Child reversionary income stream Solution Go to Event details on the next page. |
| 14 | Other transfer balance cap event Any other transfer balance cap event. |
| | If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO. |
| | Event type: Member commutation |
| | Income stream stops being in retirement phase |
| | Structured settlement – post 1 July 2017 |
| | Go to Event details on the next page. |

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| 15 | Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance. | | | |
| | Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. | | | |
| | Event type: Accumulation phase value Retirement phase value (30 June 2018 only) | | | |
| 16 | Concessional contributions Information regarding the notional taxed contributions of a member. | | | |
| | Only use this event type if you are reporting information for your member's notional taxed contributions. | | | |
| | Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) | | | |
| Εv | ent details | | | |
| 0 | You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. | | | |
| 17 | Effective date | | | |
| 18 | Value \$ | | | |
| 19 | If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) | | | |
| | Only complete this question if the <i>Reporting event type</i> is Commutation authority – commuted in full or | | | |
| Commutation authority – commuted in part. | | | | |
| | If unknown leave this question blank. No Yes | | | |
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| Se | ection E-1: Member account details | | | |
| • | Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. | | | |
| 20 | Member account type | | | |
| | Account-based income stream | | | |
| | Capped defined benefit income stream just before 1 July 2017 | | | |
| | Market-linked capped defined benefit income stream just before 1 July 2017 | | | |
| | Capped defined benefit income stream on or after 1 July 2017 | | | |
| 21 | Is the account closed? | | | |
| 00 | No Yes | | | |
| 22 | Unique superannuation identifier (USI) If you don't have a USI leave this question blank | | | |
| 23 | Member account number | | | |
| 24 | Member client identifier (number) | | | |
| | If you don't have a member client identifier leave this question blank | | | |

| Se | ection D-2: Event two |
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| 0 | Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a third event in Section D-3. |
| 11 | Is the second event: |
| | A response to a commutation authority Go to question 12. |
| | An income stream that commenced prior to 1 July 2017 Go to question 13. |
| | An income stream that commenced on or after 1 July 2017 Go to question 13. |
| | A limited recourse borrowing arrangement repayment Go to question 13. |
| | A different transfer balance cap event Go to question 14. |
| | Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16 |
| Tra | ansfer balance cap event |
| 12 | Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream. |
| | Event type: Commutation authority – commuted in full |
| | |
| | Commutation authority – commuted in part |
| | Commutation authority – deceased |
| | Commutation authority – defined benefit Go to Event details on the next page. |
| 12 | |
| 13 | Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment. |
| | If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report. |
| | Event type: Super income stream |
| | |
| | Reversionary income stream |
| | LRBA repayment |
| 14 | Other transfer balance cap event Any other transfer balance cap event. |
| | If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO. |
| | Event type: Member commutation |
| | |
| | Income stream stops being in retirement phase |
| | Structured settlement – post 1 July 2017 Go to Event details on the next page. |
| | GO to Event details on the next page. |

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| 13 | Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance. |
| | Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. |
| | Event type: Accumulation phase value Retirement phase value (30 June 2018 only) |
| 16 | Concessional contributions Information regarding the notional taxed contributions of a member. |
| | Only use this event type if you are reporting information for your member's notional taxed contributions. |
| | Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) |
| Ev | ent details |
| 0 | You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. |
| 17 | Effective date |
| 18 | Value \$ |
| 19 | If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) |
| | ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or |
| | Commutation authority – commuted in part. |
| | If unknown leave this question blank. |
| | No Yes |
| _ | |
| Se | ection E-2: Member account details |
| 0 | Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. |
| 20 | Member account type |
| | Account-based income stream |
| | Capped defined benefit income stream just before 1 July 2017 |
| | Market-linked capped defined benefit income stream just before 1 July 2017 |
| | Capped defined benefit income stream on or after 1 July 2017 |
| 21 | Is the account closed? |
| | No Yes |
| 22 | Unique superannuation identifier (USI) If you don't have a USI leave this question blank |
| | If you don't have a osheave this question blank |
| 23 | Member account number |
| | |
| 24 | Member client identifier (number) If you don't have a member client identifier leave this question blank |
| | In your distriction of the fill the fil |
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| Se | ection D-3: Event three |
| 0 | Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a fourth event in Section D-4. |
| 11 | Is the third event: |
| | A response to a commutation authority Go to question 12. |
| | An income stream that commenced prior to 1 July 2017 Go to question 13. |
| | An income stream that commenced on or after 1 July 2017 Go to question 13. |
| | A limited recourse borrowing arrangement repayment Go to question 13. |
| | A different transfer balance cap event Go to question 14. |
| | Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16 |
| Tra | ansfer balance cap event |
| 12 | Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream. |
| | Event type: Commutation authority – commuted in full |
| | Commutation authority – commuted in part |
| | Commutation authority – deceased |
| | Commutation authority – defined benefit |
| | So to Event details on the next page. |
| 13 | Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment. |
| | If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report. |
| | Event type: Super income stream |
| | Reversionary income stream |
| | LRBA repayment |
| 14 | Other transfer balance cap event |
| | Any other transfer balance cap event. |
| | If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO. |
| | Event type: Member commutation |
| | Income stream stops being in retirement phase |
| | Structured settlement – post 1 July 2017 |
| | So to Event details on the next page. |
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| | her information |
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| | |
| 13 | Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance. |
| | Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. |
| | Event type: Accumulation phase value Retirement phase value (30 June 2018 only) |
| 16 | Information regarding the notional taxed contributions of a member. |
| | Only use this event type if you are reporting information for your member's notional taxed contributions. |
| | Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) |
| Ev | ent details |
| 0 | You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. |
| 17 | Effective date |
| 18 | Value \$ |
| 19 | If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) |
| | ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or |
| | Commutation authority – commuted in part. |
| | If unknown leave this question blank. |
| | No Yes |
| _ | |
| Se | ection E-3: Member account details |
| U | Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. |
| 20 | Member account type |
| | Account-based income stream |
| | Capped defined benefit income stream just before 1 July 2017 |
| | Market-linked capped defined benefit income stream just before 1 July 2017 |
| | Capped defined benefit income stream on or after 1 July 2017 |
| 21 | Is the account closed? |
| | No Yes Yes |
| 22 | Unique superannuation identifier (USI) If you don't have a USI leave this question blank |
| | |
| 23 | Member account number |
| | |
| 24 | Member client identifier (number) If you don't have a member client identifier leave this question blank |
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| Se | ection D-4: Event four |
| 0 | Refer to the instructions for more information on how to complete this section. Only report one event in this section. |
| 11 | Is the fourth event: |
| | A response to a commutation authority Go to question 12. |
| | An income stream that commenced prior to 1 July 2017 Go to question 13. |
| | An income stream that commenced on or after 1 July 2017 Go to question 13. |
| | A limited recourse borrowing arrangement repayment Go to question 13. |
| | A different transfer balance cap event Go to question 14. |
| | Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16 |
| Tra | ansfer balance cap event |
| 12 | Commutation authority An event that occurred in response to a commutation authority issued by the ATO. |
| | A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream. |
| | Event type: Commutation authority – commuted in full |
| | Commutation authority – commuted in part |
| | Commutation authority – deceased |
| | Commutation authority – defined benefit |
| | Go to Event details on the next page. |
| 13 | Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment |
| 10 | A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment. |
| | If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report. |
| | Event type: |
| | Super income stream |
| | Reversionary income stream |
| | LRBA repayment |
| 14 | Other transfer balance cap event |
| | Any other transfer balance cap event. |
| | If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO. |
| | Event type: Member commutation |
| | Income stream stops being in retirement phase |
| | Structured settlement – post 1 July 2017 |
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| | |

| 15 Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to tac placy autotralisations for more information on Total super balance of a member. Refer to tac placy autotralisations for more information on Total super balance cap. Retirement phase value is used to calculate your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. Event type: Accumulation phase value Retirement phase value (30 June 2018 only) 16 Concessional contributions Information regarding the notional taxed contributions of a member. Only use this event type if you are reporting information for your member's notional taxed contributions. Event type: Uneapped notional laxed contributions (from 2017–18 financial year onwards) Event details You must complete C17 and C18 for each event reported with the exception of Commutation authority (decessed) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date You are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) You complete this question if the Appending event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question blank income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream just before 1 July 2017 Tapped defined benefit income stream in a feet of the part of the | Ot | her information |
|---|---------|--|
| Refer to ato, gov. autrotals, perhalence for more information on Total super balance. | 15 | Total super balance |
| Levent type: Accumulation phase value | | |
| Accumulation phase value Retirement phase value (30 June 2018 only) 16 Concessional contributions Information regarding the notional taxed contributions of a member. ① Only use this event type if you are reporting information for your member's notional taxed contributions. Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details ① You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date | | used to calculate your member's total super balance and is only required from 30 June 2018. |
| Information regarding the notional taxed contributions of a member. Decided Property Uses this event type if you are reporting information for your member's notional taxed contributions. Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details Vou must complete 017 and 018 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. Teffective date Section to the super system) Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 To apped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 To apped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream on or after 1 July 2017 Warket-linked capped defined benefit income stream or or after 1 July 2017 Warket-linked capped defined benefit income stream | | |
| Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) Event details Vou must complete 017 and 018 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. **Ver** **Ver** **In **In **Ver** 19 **If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) **Only complete this question if the **Reporting event type is Commutation authority - commuted in full or Commutation authority - commuted in part. If unknown leave this question blank. No **Yes** **Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. **Question E-4: Member account details** Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. **Question E-4: Member account type** **Account-based income stream** **Capped defined benefit income stream just before 1 July 2017** **Market-linked capped defined benefit income stream on or after 1 July 2017** **Capped defined benefit income stream on or after 1 July 2017** **Unique superannuation identifier (USI)** If you don't have a USI leave this question blank** **Member client identifier (number)** | 16 | |
| Uncapped notional taxed contributions (from 2017–18 financial year onwards) Vou must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. The effective date | | Only use this event type if you are reporting information for your member's notional taxed contributions. |
| You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date | | |
| commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. 17 Effective date | Ev | ent details |
| 17 Effective date | • | commutation authority - defined benefit. Refer to the instructions for more information on how to complete this section. |
| 19 If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system) ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details ① Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. 20 Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 23 Member account identifier (number) | 17 | |
| (ie, paid out of the super system) ① Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes 20 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number Account identifier (number) | 18 | Value \$ |
| Commutation authority – commuted in part. If unknown leave this question blank. No Yes Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 33 Member account number We Member client identifier (number) | 19 | |
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| Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 1 Is the account closed? No Yes 2 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Wember account number 4 Member client identifier (number) | | · |
| Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number Member client identifier (number) | | |
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| Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number Member client identifier (number) | • | Only certain event types require you to answer question 20. Refer to the instructions for more information on how to |
| Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 23 Member account identifier (number) | 20 | |
| Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 23 Member account number 24 Member client identifier (number) | 20 | |
| Capped defined benefit income stream on or after 1 July 2017 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank 23 Member account number 24 Member client identifier (number) | | Capped defined benefit income stream just before 1 July 2017 |
| 21 Is the account closed? No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 24 Member client identifier (number) | | Market-linked capped defined benefit income stream just before 1 July 2017 |
| No Yes 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number 24 Member client identifier (number) | | Capped defined benefit income stream on or after 1 July 2017 |
| 22 Unique superannuation identifier (USI) If you don't have a USI leave this question blank 23 Member account number 24 Member client identifier (number) | 21 | Is the account closed? |
| 23 Member account number 24 Member client identifier (number) | | No Yes Yes |
| 23 Member account number 24 Member client identifier (number) | 22 | • • • |
| 24 Member client identifier (number) | | |
| , , | 23 | Member account number |
| , , | | |
| If you don't have a member client identifier leave this question blank | 24 | Member client identifier (number) If you don't have a member client identifier leave this question blank |
| | | |

| Sec | ction F: Third party details | |
|-------------|---|--|
| (| You only need to complete Section F if the <i>Reporting event type</i> is Child death benefit income stream or Child reversionary income stream . Otherwise leave Section F blank. You must complete this section with the deceased person's details. | |
| 25 | Tax file number (TFN) | |
| (| You don't have to provide the TFN to us. However, if you do, it will help us identify the third party correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy | |
| 26 I | Name | |
| Family | y name | |
| | | |
| First g | given name Other given names | |
| | | |
| 27 | Date of birth Day / Month / Year / Year | |

| Section G: Declarations |
|--|
| Complete the declaration that applies to you. Print your full name then sign and date the declaration. Complete the declaration that applies to you. Print your full name then sign and date the declaration. Penalties may be imposed for |
| Defore you sign the declaration, check that you have provided true and correct information. Penalties may be imposed for giving false or misleading information. |
| Trustee, director or authorised officer declaration Complete this declaration if you are the trustee, director or authorised officer of the super provider. I declare that the information contained in the statement is true and correct. |
| Name MICHAEL ROSS CONTRACTOR CONT |
| Business hours phone number (include area code) 0 4 0 3 0 3 1 8 7 7 |
| Trustee, director or authorised officer signature |
| Michael Roza Date 29/01/2020 |
| OR |
| Authorised representative declaration Complete this declaration if you are an authorised representative of the super provider or life insurance company. I declare that: I have prepared the statement with the information supplied by the super provider or life insurance company I have received a declaration made by the super provider or life insurance company that the information provided to me for the preparation of this statement is true and correct I am authorised by the super provider or life insurance company to give the information in the statement to the ATO. |
| Name ———————————————————————————————————— |
| |
| Business hours phone number (include area code) |
| Authorised representative signature |
| Date Day Month Year |
| |
| Lodging this report |
| Do not remove any pages when lodging your report, all pages must be returned for the form to be accepted. |
| You can lodge this report via: Tax Agent Portal |
| Business Portal if you are a business portal user Post |

Lodging through the Tax Agent Portal or Business Portal means you will receive an instant receipt.

If you are lodging by post, use the postal address below:

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