

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

DONALDSON SUPERANNUATION FUND

2 Postal address

88 NORTH QUAY CIRCUIT

Suburb/town/locality

HOPE ISLAND

State/territory

QLD

Postcode

4212

3 Australian business number (ABN) or withholder payer number

92632761244

4 Authorised contact person

Title:

Family name

DONALDSON

First given name

Other given names

MARK

5 Daytime phone number (include area code)

Section B: Member's details

6 Your full name

Title:

Family name

DONALDSON

First given name

Other given names

BEVERLY

7 Current postal address

68 WILDFLOWER CRT

Suburb/town/locality

UPPER COOMERA

State/territory

QLD

Postcode

4209

8 Date of birth

22 NOVEMBER 1953

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: \$ 132425.38

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: \$

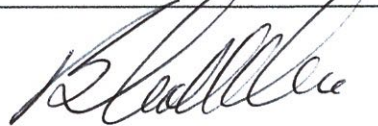
Section G: Member's declaration

I authorise my superannuation lump sum to be paid as instructed on this statement.

Name (print in block letters)

BEVERLY DONALDSON

Signature



Date

14/12/18

! 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 2019

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	546860272		
Surname or family name	DONALDSON		
Given name(s)	BEVERLY		
Residential address	68 WILDFLOWER CRT		
Suburb/town/locality	State/territory	Postcode	
UPPER COOMERA	QLD	4209	
Date of birth (if known)	Day	Month	Year
	22	NOVEMBER	1953

Section B: Payment details

Date of payment	30 NOVEMBER 2018
TOTAL TAX WITHHELD \$	
Taxable component	
Taxed element	\$ 117399.04
Untaxed element	\$
Tax-free component	\$ 15026.34

Is this payment a death benefit? No ☒ Yes ☐

Type of death benefit Trustee of deceased estate ☐ or Non-dependant ☐


Section C: Payer details

Australian business number (ABN) or withholding payer number (WPN)	92632761244	Branch number	
Name (use the same name that appears on your activity statement)			
DONALDSON SUPERANNUATION FUND			

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



Date

14/12/2018

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

DONALDSON SUPERANNUATION FUND

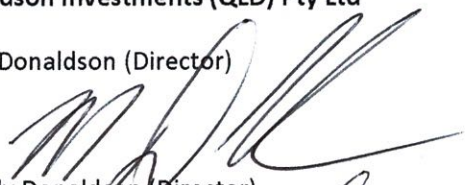
Resolution of trustees of Donaldson Superannuation Fund

We, the trustees of Donaldson Superannuation Fund hereby give notice to the members of the fund that Beverly Donaldson ceased to be a member on 30 November 2018. This is in accordance with clause 9.5 of the trust deed which states that a member ceases to be a member:

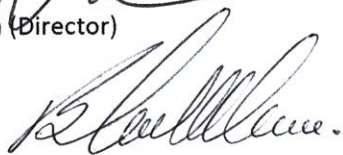
- When the total of all amounts payable under this deed in respect of the members account ceases to be payable.

Donaldson Investments (QLD) Pty Ltd

Mark Donaldson (Director)

A handwritten signature in black ink, appearing to be 'M. Donaldson', written over the name Mark Donaldson.

Beverly Donaldson (Director)

A handwritten signature in black ink, appearing to be 'B. Donaldson', written over the name Beverly Donaldson.

Dated: 30 November 2018