

Australian Government
Australian Taxation Office

Rollover benefits statement

Section A: Receiving fund's details - please state information below, if known.

Australian business number (ABN): 38425045622

Unique Superannuation identifier (USI):

Name: CATA INVESTMENTS

Member client identifier: C ALBRIGHTON

Postal address - Street address: 1/30 Orkney Place

Suburb/town/locality: LABRADOR

State/territory: QLD

Postcode: 4215

Section B: Members's details - please state information below, if known.

Tax file number (TFN): 547434291

Full name:

Title: Mr

Family name: Albrighton

First given name: Colin John

Other given names:

Postal address - Street address: Unit 1 30 Orkney Place

Suburb/town/locality: LABRADOR

State/territory: QLD

Postcode: 4215

Date of birth: 22/05/1966

Sex: Male

Daytime phone number (include area code): 07 5571 6764

Email address (if applicable):
c_albrighton@hotmail.com

Section C: Rollover transaction details

Service period start date: 01/01/1990

Tax components:

Tax-free component: \$ 289.89

KiwiSaver tax-free component: \$ 0.00

Taxable component:

Element taxed in the fund: \$ 211,335.77

Element untaxed in the fund: \$ 0.00

Total Tax components: \$ 211,625.66

Preservation amounts:

Preserved amount: \$ 211,025.39

KiwiSaver preserved amount: \$ 0.00

Restricted non-preserved amount: \$ 0.00

Unrestricted non-preserved amount: \$ 600.27

Total preservation amounts: \$ 211,625.66

Section D: Non-complying fund - only complete if you're a trustee of a non-complying fund.

Contributions made to a non-complying fund on or after 10 May 2006

Section E: Declaration

Fund's ABN: 98 503 137 921

Fund's name: Sunsuper

Contact name: Steve Davidson

Email address (if applicable):

Daytime phone number (including area code): 13 11 84

Signature of authorised person:

Steve Davidson

Date: 02/10/2019

You do not need to send a copy of this statement to the Australian Taxation Office, however, you must keep a copy for your records for a period of five years.

Rollover Benefit Statement

Section A : Receiving fund

The Trustee for CATA Investments
UNIT 1
41a Tallebudgera Creek Rd
BURLEIGH HEADS QLD 4220

THIS FORM DOES NOT HAVE TO BE INCLUDED IN A
TAX RETURN

ORIGINAL

Australian business
number (ABN)

38 425 045 622

Unique Superannuation
Identifier (USI)

Member client identifier

Section B: Member's details

Tax file Number (TFN)

Full name

Title

Family name

ALBRIGHTON

First given name

THOMAS

Other given name

Residential Address

58 RIDGWAY DRIVE

FLAGSTAFF HILL SA 5159

Date of birth

20/10/1994

Sex (M/F)

M

Daytime Phone No.

0490039904

Email address

thomasalbrighton@gmail.com

Section C: Rollover transaction details

Service period start date 10/12/2012

Tax components:

Preservation amounts:

Tax-free component

\$629.00

Preserved amount

\$33,373.51

KiwiSaver tax-free component

\$0.00

KiwiSaver preserved amount

\$0.00

Taxable component:

Element taxed in the fund

\$32,744.51

Restricted non-preserved amount

\$0.00

Element untaxed in the fund

\$0.00

Unrestricted non-preserved amount

\$0.00

Tax Components TOTAL

\$33,373.51

Preservation Amounts TOTAL

\$33,373.51