

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

2 Postal address

Suburb/town/locality

State/territory

Postcode

3 Australian business number (ABN) or withholder payer number

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:

Family name

First given name

Other given names

7 Current postal address

Suburb/town/locality

State/territory

Postcode

8 Date of birth

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	\$ <input type="text" value="26750.78"/>
Untaxed element	\$ <input type="text"/>
Tax-free component	
	\$ <input type="text" value="73249.22"/>
Total amount	\$ <input type="text" value="100000.00"/>

11 Preservation amounts of the superannuation lump sum

Preserved amount	\$ <input type="text"/>
Restricted non-preserved	\$ <input type="text"/>
Unrestricted non-preserved	\$ <input type="text" value="100000.00"/>
Total amount	\$ <input type="text" value="100000.00"/>

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

Siliana Jonini

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.

i 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

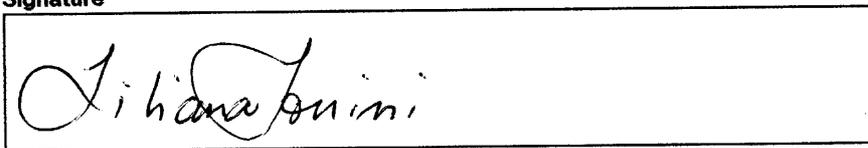
6 Roll over an amount of: \$

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



Date

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

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.