

# 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

FAENZA TRANSPORT PTY LTD STAFF SUPERANNUATION FUND

2 Postal address

[Empty box for postal address]

3 Australian business number (ABN) or withholder payer number

[Empty box for ABN or withholder payer number]

4 Authorised contact person

[Empty box for authorised contact person]

5 Daytime phone number

[Empty box for daytime phone number]

### Section B: Member's details

6 Full name

Title

MR

Family Name

FAENZA

First given name

ANGELO

Other given names

7 Postal address

UNIT 1  
65 WHITEHAVEN WAY  
PELICAN WATERS QLD 4551

8 Date of birth

02/10/1942

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**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="\$ 203,359.11"/>
Untaxed element	<input type="text" value="\$"/>
Tax-free component	
KiwiSaver tax-free component	<input type="text" value="\$ 54,057.49"/>
<b>Total amount</b>	<input type="text" value="\$ 257,416.60"/>

**11 Preservation amounts of the superannuation lump sum**

<input type="radio"/> Preserved amount	<input type="text" value="\$"/>
Restricted non-preserved amount	<input type="text" value="\$"/>
Unrestricted non-preserved amount	<input type="text" value="\$ 257,416.60"/>
<b>Total amount</b>	<input type="text" value="\$ 257,416.60"/>

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**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

---

### Section E: Cash amount

1 Pay me a gross cash amount of:

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.

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### 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:

5 Member account number

6 Roll over an amount of:

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### Section G: Member's declaration

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

ANGELO FAENZA

Signature

Date

Give this completed statement to your super fund. You should keep a copy for your records for a period of five years.

# PAYG Payment Summary - Superannuation Lump Sum

## Payment summary for year ending 30 June 2021

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.

### Payee Details

Payee's surname or family name

FAENZA

Payee's given name(s)

ANGELO

Payee's address

UNIT 1

65 WHITEHAVEN WAY

PELICAN WATERS QLD 4551

Date of birth

02/10/1942

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](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61

Date of payment

30/06/2021

Payee's Tax File Number

687105102

Total Tax withheld

\$

Taxable component

Taxed element

203,359

Untaxed element

Tax free component

54,057

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payment made to trustee

### Payer Details

Payer's ABN or Withholder Payer Number

Branch Number

Payer's Name

FAENZA TRANSPORT PTY LTD STAFF SUPERANNUATION FUND

Signature of authorised person

Date

/ /

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5 Daytime phone number

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6 Full name

Title MR

Family Name

FAENZA

First given name

Other given names

ANGELO

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**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

KiwiSaver tax-free component

**Total amount**

**11 Preservation amounts of the superannuation lump sum**

Preserved amount

Restricted non-preserved amount

Unrestricted non-preserved amount

**Total amount**

---

**Section D: Superannuation provider's signature**

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Date of payment

30/06/2021

Payee's Tax File Number

687105102

Total Tax withheld

\$

Taxable component

Taxed element

37,053

Untaxed element

Tax free component

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payment made to trustee

### Payer Details

Payer's ABN or Withholder Payer Number

Branch Number

Payer's Name

FAENZA TRANSPORT PTY LTD STAFF SUPERANNUATION FUND

Signature of authorised person

Date

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8 Date of birth

02/10/1942

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### 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	\$	49,335.80
Untaxed element	\$	
Tax-free component	\$	89,716.62
KiwiSaver tax-free component	\$	
<b>Total amount</b>	\$	139,052.42

#### 11 Preservation amounts of the superannuation lump sum

Preserved amount	\$	
Restricted non-preserved amount	\$	
Unrestricted non-preserved amount	\$	139,052.42
<b>Total amount</b>	\$	139,052.42

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### 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

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5 Member account number

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Date of payment

30/06/2021

Payee's Tax File Number

687105102

Total Tax withheld

\$

Taxable component

Taxed element

49,335

Untaxed element

Tax free component

89,716

KiwiSaver tax-free component

Death benefit

Type of death benefit

Payment made to trustee

### Payer Details

Payer's ABN or Withholder Payer Number

Branch Number

Payer's Name

FAENZA TRANSPORT PTY LTD STAFF SUPERANNUATION FUND

Signature of authorised person

Date

/ /