

Mrs Janice Page  
49 Tower Avenue  
ATHERTON QLD 4883

## Your superannuation rollover request is complete

Hi Janice,

We've completed your request to rollover part of your superannuation to another super account. Enclosed is your Rollover Benefits Statement. Please review and keep it for your records.

### How to find information online

To view up-to-date details of your account, you can go to [panoramainvestor.com.au](https://panoramainvestor.com.au) and sign in using your existing username and password.

If you'd like to receive your correspondence online as soon as it is available, you can change your correspondence preference on the 'Account details' page for your account.

Call us on 1300 881 716 if you'd like to register for online access.

### Need help?

For additional information or if you have any questions, please contact Angelo Veschetti at [angelo@veschetti-crompton.com.au](mailto:angelo@veschetti-crompton.com.au).

Yours sincerely,



Kathy Vincent  
General Manager Platforms & Investments

# Rollover Benefits Statement

You are receiving this as we have completed your request to rollover benefits to your nominated fund or retirement savings account (RSA). This is for your records only and does not need to be submitted to the ATO.

## A Receiving fund

<b>Australian Business Number (ABN)</b>	73 448 673 878
<b>Fund name</b>	Sunshine Super Fund
<b>Postal address</b>	
<b>Unique superannuation identifier (USI)</b>	
<b>Member client identifier</b>	

## B Member's details

<b>Account number</b>	402858427
<b>Tax File Number (TFN)</b>	546 303 267
<b>Full name</b>	Janice Evelyn Page
<b>Residential address</b>	49 Tower AVE Atherton QLD 4883
<b>Date of birth</b>	24 January 1956
<b>Sex</b>	Female
<b>Daytime phone number</b>	+61 740 915 699
<b>Email address</b>	jpage24@bigpond.com

# Rollover Benefits Statement

## C Rollover transaction details

<b>Service period start date</b>	23 January 1990
<b>Tax components</b>	
Tax-free component	\$311,849.41
KiwiSaver tax-free component	\$0.00
<b>Taxable component</b>	
Element taxed in the fund	\$88,150.59
Element untaxed in the fund	\$0.00
<b>Tax components total</b>	<b>\$400,000.00</b>
<b>Preservation amounts</b>	
Preserved amount	\$0.00
KiwiSaver preserved amount	\$0.00
Restricted non-preserved amount	\$0.00
Unrestricted non-preserved amount	\$400,000.00
<b>Preservation amounts total</b>	<b>\$400,000.00</b>

## D Non-complying funds

<b>Contributions made to a non-complying fund on or after 10 May 2006</b>	\$0.00
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## E Transferring fund

<b>Fund ABN</b>	39 827 542 991
<b>Fund name</b>	The Trustee for Retirement Wrap
<b>Contact name</b>	Kathy Vincent
<b>Daytime phone number</b>	1300 881 716
<b>Email address</b>	

# Rollover Benefits Statement

## **F** Declaration

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### TRUSTEE, DIRECTOR OR AUTHORISED OFFICER DECLARATION

I declare that the information contained in the statement is true and correct.

#### **Signature of Authorised Officer**



Kathy Vincent  
General Manager Platforms & Investments  
BT Financial Group  
1300 881 716  
20 January 2022

BT Portfolio Services Ltd ABN 73 095 055 208 (BTPS) administers Panorama Super. BT Funds Management Limited ABN 63 002 916 458 (BTFM) is the trustee and issuer of Panorama Super, which is part of Retirement Wrap ABN 39 827 542 991.

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