

Australian Government Australian Taxation Office

Super transfer balance account report

Who should complete this report?

Super providers and life insurance companies should complete this report when:

- m there is a transfer balance account reporting requirement
- further information is required to calculate a member's total super balance
- further information is required to determine a member's concessional contributions amount
- f m incorrect information has previously been reported to us.

The obligation to report is on:

- the trustee of the fund for a super fund, including self-managed super funds (SMSFs) or an approved deposit fund (ADF)
- m the retirement savings account (RSA) provider for an RSA
- a director of the life insurance company for a life insurance company.

Instructions

Follow the Super transfer balance account report instructions for assistance when completing this report.

You must complete and lodge separate reports for each member. If you have more than four events to report for a member you must lodge separate reports. However, if you are reporting a child death benefit income stream or a child reversionary income stream you can only report one event per report.

To cancel or update information already reported to us, you must cancel the original report. Ensure the "Yes" box in Section B is clearly marked and lodge the report exactly the same as the original event. A new report can then be lodged with the correct information.

Completing this report

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

■ Place X in ALL applicable boxes.



Section A: Member details		
1 Tax file number (TFN) 5 4 6 0 2 7 8 9 3		
You don't have to provide the TFN to us. However, if you do, it will help us identify the mem and process your report quickly. For more information on privacy, refer to ato.gov.au/priva	nber correctly	
2 Name		
Title: Mr X Mrs Miss Ms Other Other		
RICHARDSON Other given names		
HUGH DAVID		
3 Date of birth 2 2 / 1 2 / 1 9 5 2		
4 Current residential address		
63 BALAAM ROAD		
Suburb/town		
BOWEN	State/territory	Postcode 4 8 0 5
Country if other than Australia	(Australia only)	(Australia only)

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Se	ction B: Cancellation
5	Are you cancelling a previous transfer balance account event? No Yes Description: No Pervious transfer balance account event? Yes Description: Yes Descr
Se	ction C: Fund/Supplier/Provider details
0	If you are an SMSF trustee completing this report for a member of your SMSF you may leave questions 6 and 7 blank.
6	Intermediary/Supplier name One of the state
7	Australian business number (ABN) Your contact details are required in case we need to speak to you about details supplied on this report. Provide your contact details in Section G.
8 H	Fund/Provider name DRICHARDSON SUPERANNUATION FUND
9	Fund/Provider ABN 7 4 7 9 5 9 2 2 3 7 4
10	Fund/Provider TFN 9 6 9 4 6 1 5 2
	You don't have to provide the TFN to us. However, if you do, it will help us identify the fund/provider correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy

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Se	ection D-1: Event one
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a second event in Section D-2.
11	Is the first event:
	A response to a commutation authority 6 Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 S Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16
Tr	ansfer balance cap event
12	Commutation authority
	An event that occurred in response to a commutation authority issued by the ATO.
	A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type:
	Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit
	So to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that
	commenced on or after 1 July 2017; or an LRBA repayment. If you select either child death benefit income stream or child reversionary income stream you must complete Section F
	and you can only report one event on this report.
	Event type:
	Super income stream X
	Reversionary income stream
	LRBA repayment
	If you select one of the below events you can only report one event in this report. Refer to the instructions for more information.
	Child death benefit income stream
	Child reversionary income stream
14	Other transfer balance cap event Solution of the next page.
	Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
ı	So to Event details on the next page.
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Ot	her information
15	Total super balance Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance.
	Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018. Event type:
16	Accumulation phase value Retirement phase value (30 June 2018 only) Concessional contributions Information regarding the notional taxed contributions of a member.
	Only use this event type if you are reporting information for your member's notional taxed contributions.
	Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards)
Ev	ent details
0	You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section.
17	Effective date 0 1 / 0 7 / 2 0 2 1
18	Value \$ 25133:12
19	If you are responding to a commutation authority, was the commutation paid directly to the member? (ie, paid out of the super system)
	 Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes
Se	ection E-1: Member account details
0	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question.
20	Member account type Account-based income stream
	Capped defined benefit income stream just before 1 July 2017
	Market-linked capped defined benefit income stream just before 1 July 2017
	Capped defined benefit income stream on or after 1 July 2017
21	
	No X Yes
22	Unique superannuation identifier (USI)
	If you don't have a USI leave this question blank
23	Member account number
_•	
24	Member client identifier (number)
	If you don't have a member client identifier leave this question blank

Se	ection D-2: Event two
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a third event in Section D-3.
11	Is the second event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16
Tra	ansfer balance cap event
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring
	the provider to commute an amount out of a specified super income stream.
	Event type: Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit
	So to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment
	A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type: Super income stream
	Reversionary income stream
	LRBA repayment
14	Other transfer balance cap event Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
	So to Event details on the next page.

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	ner information
	Total super balance
	Complete this question to provide information regarding the total super balance of a member. Refer to <u>ato.gov.au/totalsuperbalance</u> for more information on Total super balance.
	Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018.
	Event type: Accumulation phase value Retirement phase value (30 June 2018 only)
6	Concessional contributions Information regarding the notional taxed contributions of a member.
	① Only use this event type if you are reporting information for your member's notional taxed contributions.
	Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards)
:V	ent details
	You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section.
7	Effective date / / / / / / / / / / / / / / / / / / /
8	Value \$ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
9	If you are responding to a commutation authority, was the commutation paid directly to the member?
•	(ie, paid out of the super system)
	Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part.
	If unknown leave this question blank.
	No Yes
Se	ction E-2: Member account details
0	CHOILE. Welliber account details
	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to
20	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question.
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	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017
21	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI)
21	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes
21	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank
21	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI)
21 22 23	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number Member client identifier (number)
21 22 23	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank Member account number

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Se	ction D-3: Event three
	Refer to the instructions for more information on how to complete this section. Only report one event in this section. You can report a fourth event in Section D-4.
11	Is the third event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
àL	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16.
Tra	ansfer balance cap event
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO.
	A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type: Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit
	So to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment
	A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type: Super income stream
	Reversionary income stream
	LRBA repayment
	Go to Event details on the next page.
14	Other transfer balance cap event Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO. Event type:
	Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
	Go to Event details on the next page.

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Ot	ner information
15	Total super balance
	Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance.
	Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value is used to calculate your member's total super balance and is only required from 30 June 2018.
	Event type: Accumulation phase value Retirement phase value (30 June 2018 only)
16	Concessional contributions Information regarding the notional taxed contributions of a member.
	① Only use this event type if you are reporting information for your member's notional taxed contributions.
	Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards)
Εv	ent details
	You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) and commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section
17	Effective date
18	Value \$
19	If you are responding to a commutation authority, was the commutation paid directly to the member?
	(ie, paid out of the super system) Only complete this question if the Reporting event type is Commutation authority – commuted in full or
	Commutation authority – commuted in part.
	If unknown leave this question blank.
	No Yes
_	
	ection E-3: Member account details
U	Only certain event types require you to answer question 20. Refer to the instructions for more information on how to complete this question.
20	Member account type
	Account-based income stream
	Capped defined benefit income stream just before 1 July 2017
	Market-linked capped defined benefit income stream just before 1 July 2017
	Capped defined benefit income stream on or after 1 July 2017
21	Is the account closed?
	No Yes Yes
22	Unique superannuation identifier (USI) If you don't have a USI leave this question blank
23	Member account number
24	Member client identifier (number) If you don't have a member client identifier leave this question blank
	TI YOU GOT THAVE A THEIR HOLD CHAIR INC. I SEAVE IT IN QUOCION DIGHT.

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Se	ction D-4: Event four
0	Refer to the instructions for more information on how to complete this section. Only report one event in this section.
11	Is the fourth event:
	A response to a commutation authority Go to question 12.
	An income stream that commenced prior to 1 July 2017 Go to question 13.
	An income stream that commenced on or after 1 July 2017 Go to question 13.
	A limited recourse borrowing arrangement repayment Go to question 13.
	A different transfer balance cap event Go to question 14.
	Additional information to calculate a member's total super balance or concessional contributions - Go to questions 15 and 16
Tra	ansfer balance cap event
12	Commutation authority An event that occurred in response to a commutation authority issued by the ATO. A commutation authority is a notice the Commissioner issues to a super income stream provider requiring the provider to commute an amount out of a specified super income stream.
	Event type: Commutation authority – commuted in full
	Commutation authority – commuted in part
	Commutation authority – deceased
	Commutation authority – defined benefit Solution Go to Event details on the next page.
13	Pre-existing or new income stream event or a limited recourse borrowing arrangement (LRBA) repayment
	A transfer balance cap event in relation to an income stream in existence just before 1 July 2017; a new income stream that commenced on or after 1 July 2017; or an LRBA repayment.
	If you select either child death benefit income stream or child reversionary income stream you must complete Section F and you can only report one event on this report.
	Event type: Super income stream
	Reversionary income stream
	LRBA repayment
	S Go to Event details on the next page.
14	Other transfer balance cap event
	Any other transfer balance cap event.
	If your member has voluntarily requested that you commute an amount, select Member commutation event type. Do not use this event type if you are responding to a commutation authority from the ATO.
	Event type: Member commutation
	Income stream stops being in retirement phase
	Structured settlement – post 1 July 2017
	So to Event details on the next page.

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15 Total super balance	
Complete this question to provide information regarding the total super balance of a member. Refer to ato.gov.au/totalsuperbalance for more information on Total super balance. Do not use these event types if you are reporting about your member's transfer balance cap. Retirement phase value you member's total super balance and is only required from 30 June 2018. Event type: Accumulation phase value Retirement phase value (30 June 2018 only) 6 Concessional contributions information regarding the notional taxed contributions of a member. ① Only use this event type if you are reporting information for your member's notional taxed contributions. Event type: Uncapped notional taxed contributions (from 2017–18 financial year onwards) 2 You must complete Q17 and Q18 for each event reported with the exception of Commutation authority (deceased) are commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section of the super system) 8 Yalue \$	
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commutation authority – defined benefit. Refer to the instructions for more information on how to complete this section. Feffective date	
Statue	nd n.
If you are responding to a commutation authority, was the commutation paid directly to the mer (ie, paid out of the super system) Only complete this question if the Reporting event type is Commutation authority – commuted in full or Commutation authority – commuted in part. If unknown leave this question blank. No Yes Only certain event types require you to answer question 20. Refer to the instructions for more information on h complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream on or after 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank	
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Section E-4: Member account details Only certain event types require you to answer question 20. Refer to the instructions for more information on he complete this question. Member account type Account-based income stream Capped defined benefit income stream just before 1 July 2017 Market-linked capped defined benefit income stream just before 1 July 2017 Capped defined benefit income stream on or after 1 July 2017 1 Is the account closed? No Yes Unique superannuation identifier (USI) If you don't have a USI leave this question blank	
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2 Unique superannuation identifier (USI) If you don't have a USI leave this question blank	
If you don't have a USI leave this question blank	
3 Member account number	
L. L	
Member client identifier (number) If you don't have a member client identifier leave this question blank	

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Se	ection F: Third party details
	You only need to complete Section F if the Reporting event type is Child death benefit income stream or Child reversionary income stream. Otherwise leave Section F blank. You must complete this section with the deceased person's details.
25	Tax file number (TFN)
	You don't have to provide the TFN to us. However, if you do, it will help us identify the third party correctly and process your report quickly. For more information on privacy, refer to ato.gov.au/privacy
26	Name illy name
First	given name Other given names
27	Date of birth Day / Day / Wonth / Year

Section G: Declarations
Complete the declaration that applies to you. Print your full name then sign and date the declaration.
Before you sign the declaration, check that you have provided true and correct information. Penalties may be imposed for giving false or misleading information.
Trustee, director or authorised officer declaration Complete this declaration if you are the trustee, director or authorised officer of the super provider. I declare that the information contained in the statement is true and correct.
Name HUGHRICHARDSON Business hours phone number (include area code) 0 7 4 7 8 6 1 9 9 9
Trustee, director or authorised officer signature
Date 1 2 / 1 0 / 2 0 2 1
OR
Authorised representative declaration Complete this declaration if you are an authorised representative of the super provider or life insurance company. I declare that: I have prepared the statement with the information supplied by the super provider or life insurance company I have received a declaration made by the super provider or life insurance company that the information provided to me for the preparation of this statement is true and correct I am authorised by the super provider or life insurance company to give the information in the statement to the ATO.
Business hours phone number (include area code)
Authorised representative signature
Date Day / Month / Year
Lodging this report
Do not remove any pages when lodging your report, all pages must be returned for the form to be accepted.
You can lodge this report via: Tax Agent Portal Business Portal if you are a business portal user Post
Lodging through the Tax Agent Portal or Business Portal means you will receive an instant receipt.
If you are lodging by post, use the postal address below: Australian Taxation Office PO BOX 3006 PENRITH NSW 2740