

# ROLLOVER BENEFITS STATEMENT



## Personal details

|                            |  |                     |                 |               |
|----------------------------|--|---------------------|-----------------|---------------|
| Title                      | Mr   | Residential Address | 35 Devon Street |               |
| Family name                | Kimber   |                     |                 |               |
| Given names                | Craig Andrew   |                     |                 |               |
| Other/previous names       |  | Suburb              | LARGS BAY       |               |
| Date of birth (DD/MM/YYYY) | 04/09/1970   | State/territory     | SA              | Postcode 5016 |
| Gender                     | Male <input checked="" type="checkbox"/> Female <input type="checkbox"/> | Country             |                 |               |
| Email                      | craig.kimber@optusnet.com.au   |                     |                 |               |
| Contact phone number       |  |                     |                 |               |
| Tax file number            | 151636241  |                     |                 |               |

**Important:** Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there might be tax consequences.

## Rollover transaction details Service Period Start Date 01/12/1989

| Tax components               |                    | Preservation amounts              |                    |
|------------------------------|--------------------|-----------------------------------|--------------------|
| Tax-free component           | \$301.79           | Preserved amount                  | \$55,000.00        |
| KiwiSaver tax-free component | \$0.00             | KiwiSaver preserved amount        | \$0.00             |
| Taxable component:           |                    | Restricted non-preserved          | \$0.00             |
| Element taxed in the fund    | \$54,698.21        | Unrestricted non-preserved        | \$0.00             |
| Element untaxed in the fund  | \$0.00             | <b>Total Preservation amounts</b> | <b>\$55,000.00</b> |
| <b>Total Tax components</b>  | <b>\$55,000.00</b> |                                   |                    |

## From super fund details

|                                  |                    |
|----------------------------------|--------------------|
| Fund name                        | Mercer Super Trust |
| Fund phone number                | 1800 682 525       |
| Membership or account number     | 100289             |
| Australian business number (ABN) | 19905422981        |

## To super fund details

|                                  |                   |
|----------------------------------|-------------------|
| Fund name                        | KIMBER SUPER FUND |
| Fund phone number                |                   |
| Membership or account number     | SMSF1             |
| Australian business number (ABN) | 75752705967       |
| Unique superannuation identifier |                   |

## Authorised representative declaration

I declare that:

- I have prepared the statement with the information supplied by the superannuation provider
- I have received a declaration made by the superannuation provider that the information provided to me for the preparation of this statement is true and correct

I am authorised by the superannuation provider to give the information in the statement to the ATO

|                                   |                |
|-----------------------------------|----------------|
| Name of Authorised Representative | Date           |
| Cambell Holt                      | 13 August 2020 |

Return undelivered mail to:  
GPO Box 9898  
in your capital city



047 R 2  
526291901

KIMBER SUPER FUND  
EK HEMPHILL  
14 BRIDGE ST  
BALHANNAH SA 5242

