Australian Government

Australian Taxation Office

Death benefit rollover statement

Completing your statement

! Only use this form for the rollover of a death benefit for an eligible dependant beneficiary in relation to a deceased member on or after 1 July 2017.

If you need to correct an error regarding a payment made between 1 July 2013 and 30 June 2017, use NAT 70944-**03.2013**

If you need to correct an error regarding a payment made before 1 July 2013, use NAT 70944-**05.2007**.

Complete this form (or a similar form you create that collects the same information) if you are a trustee of a superannuation fund or provider of a retirement savings account (RSA) and you pay a death benefit rollover to another fund or RSA.

! You (transferring fund) must provide this form to the receiving fund within a certain time of paying the rollover death benefit. For the purposes of this form, you can transmit the member's or beneficiary's details, including TFNs: *Superannuation Industry (Supervision) Act 1993*, *Income Tax Assessment Act 1997* and *Taxation Administration Act 1953*. For more information about privacy of the information being transmitted please contact the entity you are providing this form to.

! You must provide your member or beneficiary with a statement using this form (or a similar form you create that includes the same information) for **all** death benefit rollovers within 30 days of paying the rollover, including if you applied the data standards and you didn't use this form for the fund-to-fund transaction.

Completing your statement

If you are filling in this form by hand:

■ Print clearly in BLOCK LETTERS using a black pen only.

■ Place **X** in ALL applicable boxes.

■ Use a separate form for each rollover payment you are making.

! Read the instructions carefully. Penalties may apply if you make a false or misleading statement on this form without taking reasonable care.

Section A: Receiving fund

1 Australian business number (ABN) `2` `3` `2` `8` `5` `0` `7` `8` `4` `5` `6`.

2 Fund name

COSTIN AND TUCKER PRIVATE PENSION FUND.

3 Postal address

Street address

6/18 CLAUDE BOYD PARADE.

Suburb/town/locality

CALOUNDRA

State/territory `Q` `L` `D`

Postcode `4` `5` `5` `1`

(Australia only)

Country if other than Australia

4 (a) Unique superannuation identifier (USI) `☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐`

  (b) Member client identifier `/`