



Mr Clinton Luke Chant
24 Old Belgrave Road
UPPER FERNTREE GULLY VIC 3156

16 December 2021

Dear Mr Chant

Partial rollover confirmation

Your request to make a partial rollover of \$31,000.00 to The Trustee for Chant Family Superannuation Fund was completed on 16 December 2021. You can view this transaction by logging into your account at www.ioofonline.com.au and it will also be reflected on your next annual statement.

As part of this partial rollover, please find enclosed:

- Rollover benefit statement – member copy

As your partial transfer was rolled over to another regulated fund, you do not need to include any documents with your next income tax return.

More information

If you have any questions about this letter or your account, please speak with your financial adviser. Alternatively, you can call ClientFirst on 1800 913 118 or email us at clientfirst@ioof.com.au.

Yours sincerely

A handwritten signature in black ink that reads 'F. Lombardo'.

Frank Lombardo
Chief Operating Officer

PRODUCT
IOOF Essential Super

ACCOUNT NUMBER
16590401

Rollover benefit statement — member copy

Receiving fund

Fund name

The Trustee for Chant Family Superannuation Fund

Fund postal address

Not available

Unique super identifier (USI)

Not provided

Australian business number (ABN)

35 432 527 535

Member client identifier

Not provided

Member's details

Title

Mr

Given name

Clinton Luke

Family name

Chant

Residential address

24 Old Belgrave Road
UPPER FERNTREE GULLY VIC 3156

Daytime phone number

(03) 9899 4036

Date of birth

06/01/1974

Gender

Male

Tax file number

Supplied

Email address

lukechant@hotmail.com

Rollover transaction details

Service period start date

01/07/1996

Tax components

Tax free component

\$4,314.27

KiwiSaver tax free component

\$0.00

Taxable component

Taxed element

\$26,685.73

Untaxed element

\$0.00

Preservation amounts of the rollover payment

Preserved amount

\$31,000.00

KiwiSaver preserved amount

\$0.00

Restricted non-preserved

\$0.00

Unrestricted non-preserved

\$0.00

Tax components TOTAL

\$31,000.00

Preservation amounts TOTAL

\$31,000.00

Rollover benefit statement — member copy

Transferring fund details and 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.

Fund name

IOOF Portfolio Service Superannuation Fund

Australian business number (ABN)

70 815 369 818

Contact name and authorised representative

Mr Frank Lombardo

Daytime phone number

1800 913 118

Email address

clientfirst@ioof.com.au

Signature of authorised representative



Date

16 December 2021



Mr Clinton Luke Chant
24 Old Belgrave Road
UPPER FERNTREE GULLY VIC 3156

13 December 2021

Dear Mr Chant

Partial rollover confirmation

Your request to make a partial rollover of \$89,000.00 to The Trustee for Chant Family Superannuation Fund was completed on 13 December 2021. You can view this transaction by logging into your account at www.ioofonline.com.au and it will also be reflected on your next annual statement.

As part of this partial rollover, please find enclosed:

- Rollover benefit statement – member copy

As your partial transfer was rolled over to another regulated fund, you do not need to include any documents with your next income tax return.

More information

If you have any questions about this letter or your account, please speak with your financial adviser. Alternatively, you can call ClientFirst on 1800 913 118 or email us at clientfirst@ioof.com.au.

Yours sincerely

A handwritten signature in black ink that reads 'F. Lombardo'.

Frank Lombardo
Chief Operating Officer

PRODUCT
IOOF Essential Super

ACCOUNT NUMBER
16590401

Rollover benefit statement — member copy

Receiving fund

Fund name

The Trustee for Chant Family Superannuation Fund

Fund postal address

Not available

Unique super identifier (USI)

Not provided

Australian business number (ABN)

35 432 527 535

Member client identifier

Not provided

Member's details

Title

Mr

Given name

Clinton Luke

Family name

Chant

Residential address

24 Old Belgrave Road
UPPER FERNTREE GULLY VIC 3156

Daytime phone number

(03) 9899 4036

Date of birth

06/01/1974

Gender

Male

Tax file number

Supplied

Email address

lukechant@hotmail.com

Rollover transaction details

Service period start date

01/07/1996

Tax components

Tax free component

\$12,147.53

KiwiSaver tax free component

\$0.00

Taxable component

Taxed element

\$76,852.47

Untaxed element

\$0.00

Preservation amounts of the rollover payment

Preserved amount

\$89,000.00

KiwiSaver preserved amount

\$0.00

Restricted non-preserved

\$0.00

Unrestricted non-preserved

\$0.00

Tax components TOTAL

\$89,000.00

Preservation amounts TOTAL

\$89,000.00

Rollover benefit statement — member copy

Transferring fund details and 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.

Fund name

IOOF Portfolio Service Superannuation Fund

Australian business number (ABN)

70 815 369 818

Contact name and authorised representative

Mr Frank Lombardo

Daytime phone number

1800 913 118

Email address

clientfirst@ioof.com.au

Signature of authorised representative



Date

13 December 2021