

10 December 2020



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049 UB 982

THE TRUSTEE FOR BOLTO4030 SMSF
Unit 2 278 BEAUFORT ST
PERTH WA 6000

Dear Sir/Madam

Transferred super account

Member number: S Bolton

Enclosed is the *Rollover benefits statement* for Mr Shane Bolton who has asked to transfer their AustralianSuper account to THE TRUSTEE FOR BOLTO4030 SMSF.

We're here to help

If you need help or have any questions, please call us on **1300 300 273** from **8am to 8pm AEST/AEDT weekdays** or visit our website anytime at **australiansuper.com**

Sincerely

AustralianSuper

Enclosure/s: *Rollover benefits statement*

Rollover benefits statement

Section A: Receiving fund

| | | |
|---|--|--------------------------------|
| 1 | Australian business number (ABN) | 84 497 043 014 |
| 2 | Fund name | THE TRUSTEE FOR BOLTO4030 SMSF |
| 3 | Postal address | Unit 2 278 BEAUFORT ST |
| | Suburb/town/locality | PERTH |
| | State/territory | WA |
| | Postcode | 6000 |
| | Country if outside Australia | |
| 4 | (a) Unique Superannuation Identifier (USI) | |
| | (b) Member Client Identifier | S Bolton |

Section B: Member details

| | | |
|----|--|--|
| 5 | Tax file number (TFN) | 175 834 595 |
| 6 | Full name | |
| | Title | Mr |
| | Family name | Bolton |
| | First given name | Shane |
| | Other given names | Robert |
| 7 | Residential address | |
| | Street address | 16 Curtis Way |
| | Suburb/town/locality | GIRRAWHEEN |
| | State/territory | WA |
| | Postcode | 6064 |
| | Country if outside Australia | |
| 8 | Date of birth | 02/05/1965 |
| 9 | Sex | Male <input checked="" type="checkbox"/> Female <input type="checkbox"/> |
| 10 | Daytime phone number (include area Code) | 0419 930 219 |
| 11 | Email address (if applicable) | bolto40@msn.com |

Section C: Rollover transaction details

| | | |
|----|-----------------------------------|------------------------------|
| 12 | Service period start date | Day/Month/Year 30/06/1989 |
| 13 | Tax components: | |
| | Tax-free component | \$ 85.85 |
| | KiwiSaver tax-free component | \$ 0.00 |
| | Taxable component: | |
| | Element taxed in the fund | \$ 79,914.15 |
| | Element untaxed in the fund | \$ 0.00 |
| | TOTAL Tax components | \$ 80,000.00 |
| 14 | Preservation amounts: | |
| | Preserved amount | \$ 80,000.00 |
| | KiwiSaver preserved amount | \$ 0.00 |
| | Restricted non-preserved amount | \$ 0.00 |
| | Unrestricted non-preserved amount | \$ 0.00 |
| | TOTAL Preservation amounts | \$ 80,000.00 |

Section D: Non-complying funds

15 Contributions made to a non-complying fund on or after 10 May 2006 \$ 0.00

Section E: Transferring fund

| | | |
|----|--|--------------------------------|
| 16 | Fund's ABN | 65 714 394 898 |
| 17 | Fund's name | AustralianSuper |
| 18 | Contact name | AustralianSuper Contact Centre |
| 19 | Daytime phone number (include area Code) | 1300 300 273 |
| 20 | Email address (if applicable) | australiansuper.com/email |

Section F: Declaration

AUTHORISED REPRESENTATIVE DECLARATION:

Complete this declaration if you are an authorised representative of the superannuation fund or other provider shown in section E.

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

JOE NEKIC

Authorised representative signature

JOE NEKIC

Day / Month / Year

Date

08/12/2020