

# Rollover Benefits Statement

Complete this form if you are a trustee of a superannuation fund or provider of a retirement savings account (RSA) and any of the following apply:

- You are paying a rollover superannuation benefit, other than a death benefit rollover to another fund or RSA, and you are not already providing all of this information electronically under the rollover data standards.
- You have paid a rollover superannuation benefit to another fund or RSA and are providing a statement about the rollover to your member.
- You are the trustee of a non-complying fund and are paying member benefits to another superannuation fund or RSA (complete section D instead of section C).

## SECTION A: Receiving Fund

Australian business number (ABN) : 20 848-047-705  
Fund Name : The Trustee for Autonomy Superannuation Fund  
Postal Address : 7 Cullen Avenue  
Suburb/town/locality : RICHMOND  
State/territory : NSW  
Postcode : 2753  
Country :  
(a) Unique superannuation identifier :  
(b) Member client identifier :

## SECTION B: Member's Details

Tax File Number(TFN) : 489 933 508  
Full Name  
Title : Mr  
Family Name : Toohey  
First Given Name : Michael  
Other Given Name(s) :  
Residential Address : 7 CULLEN AVENUE  
: RAAF RICHMOND  
Suburb/town/locality : RICHMOND  
State/territory : NSW  
Postcode : 2753  
Country :  
Date of Birth : 05 / 12 / 1966  
Sex : Male  
Daytime phone number :  
Email address (if applicable) : mkctoohey@gmail.com

## SECTION C: Rollover Transaction Details

Service period start date : 11 / 12 / 1984

### Tax Components

Tax-free component	\$	42,697.90
KiwiSaver tax-free component	\$	0.00
Taxable component		
Element taxed in the fund	\$	181,956.81
Element untaxed in the fund	\$	0.00

**Tax components TOTAL** \$ 224,654.71

### Preservation amounts

Preserved amount	\$	132,009.58
KiwiSaver preserved component	\$	0.00
Restricted non-preserved amount	\$	0.00
Unrestricted non-preserved amount	\$	92,645.13

**Preservation amounts TOTAL** \$ 224,654.71

## SECTION D: Non-complying funds

Contributions made to a non-complying fund on or after 10 May 2006

\$ 0.00

## SECTION E: Transferring Fund

Fund ABN : 60 910 190 523  
Fund name : HUB24 SUPER FUND  
Contact name : MATTHEW JOSE  
Daytime phone number : 1300854994  
Email address : admin@hub24.com.au

## 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 : MATTHEW JOSE

Authorised representative signature : Date: 19 October 2021

Tax agent number (if you are a registered tax agent)

## Where to send this form

Do not send this form to the ATO

If the rollover data standards **do not apply** to the transaction, you must do all of the following:

- send the form to the receiving fund in Section A within seven days of paying them the rollover
- provide a copy to the member in section B within 30 days of paying the rollover
- keep a copy in your records for a period of five years

If the rollover data standards **do apply** to the transaction, you must do all of the following:

- comply with the requirements of the data standard for the fund-to-fund interaction (do not send this form to the receiving fund in section A)
- use this form only to provide a statement to the member in section B within 30 days of paying the rollover
- keep a copy of the member statement in your records for a period of five years.

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If the rollover data standards **do apply** to the transaction, you must do all of the following:

- comply with the requirements of the data standard for the fund-to-fund interaction (do not send this form to the receiving fund in section A)
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- keep a copy of the member statement in your records for a period of five years.