Superannuation lump sum pre-payment statement

Warning: This form has been designed to assist you to prepare the Australian Tax Office's Superannuation lump sum pre-payment statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

PART 1 – SUPERANNUATION PROVIDER TO COMPLETE

Section A: Superannuation provider details

1 Superannuation fund, ADF, RSA or annuity provider name

2 Postal address

Suburb/town/locality

State/territory Postcode

3 Australian business number (ABN) or withholder payer number

4 Authorised contact person

Title: Family name

First given name

Other given names

5 Daytime phone number (include area code)

Section B: Member's details

6 Your full name

Title: Family name

First given name

Other given names

7 Current postal address

Suburb/town/locality

State/territory Postcode

8 Date of birth

Section C: Superannuation lump sum payment details

9 Lump sum payment is calculated to this date

10	Superannuation	lump sum	components
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Taxable component

	Taxed element	\$
	Untaxed element	\$
	Tax-free component	\$
	Total amount	\$
11	Preservation amounts of	the superannuation lump sum
	Preserved amount	\$
	Restricted non-preserved	\$
	Unrestricted non-preserved	\$
	Total amount	\$

Section D: Superannuation provider's signature

- 12 Date the statement is issued to the member
- 13 Member is to return statement by
- 14 Superannuation fund's, ADF's, RSA's or annuity provider's signature

Date

PART 2 – MEMBER TO COMPLETE

Section E: Cash amount

1 Pay me a gross cash amount of: \$

I understand that this amount may be subject to tax.

You may wish to speak with a tax professional or your superannuation fund, ADF, RSA or annuity provider to make sure you are aware of your tax obligations and superannuation roll over options.

Section F: Rollover payment

- 2 Roll over my payment to: (provide the full name of fund, RSA or annuity provider)
- 3 Fund ABN
- 4 Superannuation fund, ADF, RSA or annuity provider postal address:

Suburb/town/locality

- 5 Member account number
- 6 Roll over an amount of: \$

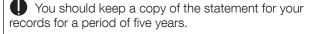
Section G: Member's declaration

I authorise my superannuation lump sum to be paid as instructed on this statement.

Name (print in block letters)

Signature

Date



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State/territory Postcode

Warning: This form has been designed to assist you to prepare the Australian Tax Office's PAYG Payment Summary Statement. It cannot be lodged with the Australian Tax Office and should not be given to fund members.

Section A: Payee details

Tax file number		
Surname or family name		
Given name(s)		
Residential address		
Suburb/town/locality	State/territory Postcode	
Day Month Year Date of birth (if known)		
Section B: Payment details		
Date of payment		
TOTAL TAX WITHHELD \$		
Taxable component		
Taxed element \$		
Untaxed element \$		
Tax-free component \$		
Is this payment a death benefit? No Yes		
Type of death benefitTrustee of deceased estateor Non-dependant		
Section C: Payer details Australian business number (ABN) or with	Australian business number (ABN) or withholding payer number (WPN)	
You must also complete this section	Branch number	
Name (use the same name that appears on your activity statement)		
Privacy - For information about your privacy visit our website at ato.gov.au/privacy		
DECLARATION – I declare that the information given on this form is complete and correct.		

Signature of authorised person

NOTICE TO PAYEE If this payment summary shows an amount in the total tax withheld box, you must lodge a tax return. If no tax was withheld, you may still have to lodge a tax return. If you have already lodged your tax return, you may need to lodge an amendment request. For more information about this payment summary, lodging your tax return or an amendment request, you can : - visit www.ato.gov.au - refer to TaxPack - phone 13 28 61

Date