



THE TRUSTEE FOR BRUCE DAVEY RETIREMENT
FUND
UNIT 1202 225 ELIZABETH ST
MELBOURNE VIC 3000

Our reference: 7125068447267

Phone: 13 10 20

ABN: 56 579 064 708

20 October 2021

Authority to release benefits due to Division 293 due and payable

Dear Trustee,

This is an authority to release benefits for BRUCE DAVEY due to Division 293 due and payable. They have requested that \$2,489.75 be released from their superannuation account. The released amount is to be paid to the ATO.

What you need to do

BRUCE DAVEY RETIREMENT FUND is required within 20 business days of the date of this letter to:

- › make a payment to us of the **lesser** of either:
 - \$2,489.75 or
 - the sum of all available release amounts for each super interest held by you for BRUCE DAVEY.
- › If you can't release the full amount, please specify your reason, and
- › return the enclosed statement to us.

You don't need to amend the contributions report you provided for this member in your SMSF annual return or member account transaction service (MATS). Releasing this benefit doesn't change the contributions you previously reported.

Need help

If you have any questions, please phone **13 10 20** between 8:00am and 6:00pm, Monday to Friday.

Yours faithfully,
Grant Brodie
Deputy Commissioner of Taxation

PAY NOW

**Your payment reference
number (PRN) is:**
551001907622526611

BPAY®



Bill code: 75556
Ref: 551001907622526611

Telephone & Internet Banking - BPAY®

Contact your bank or financial institution to make this payment from your cheque, savings, debit or credit card account. More info: www.bpay.com.au

CREDIT OR DEBIT CARD

Pay online with your credit or debit card at www.governmenteasypay.gov.au/PayATO or phone **1300 898 089**. A card payment fee applies.

OTHER PAYMENT OPTIONS

For other payment options, visit ato.gov.au/paymentoptions



Australian Government
Australian Taxation Office

Authority to release benefits due to Division 293 due and payable

Release authority statement

20 October 2021

How to complete this statement

You must:

- complete section B **and** if required section C
- sign and date the declaration (section E) that applies to you, and
- send the completed statement **without a cover sheet** by mail or fax:

mail to

Australian Taxation Office
PO Box 3578
ALBURY NSW 2640

OR fax individually to

1300 139 024

Completing this form

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

S M I T H S T

- Place ☒ in ALL applicable boxes.

You must return this statement to us within 20 business days of the issue date on the enclosed letter.



Section A: Member details

- | | |
|------------------------------------|------------------------|
| 1 Title | MR |
| 2 Family name | DAVEY |
| 3 First given name | BRUCE |
| 4 Member TFN | 190762252 |
| 5 Member account number | 1 |
| 6 Member identifier number | |
| 7 Unique superannuation identifier | |
| 8 Year of assessment | 2018 - 19 |
| 9 Payment reference number | 5510 0190 7622 5266 11 |

Section B: Details of payment

Complete this section detailing the amount paid and if required the amount unable to be released from your member's super interest.

The amount to be paid to the ATO is \$ 2,489.75

10 Amount paid \$, , .

Day Month Year

11 Date amount paid / /

12 Amount unable to be released
(Complete section C if there is an amount unable to be released) \$, , .

Section C: Reason for not releasing money

Complete this section if you cannot pay the full amount from your member's super interests.

13 Reason for non-release or partial release (Place an X in the applicable box)

- ☐ The member does not have sufficient funds available or no longer has any super interests within this fund.
- ☐ The member has funds available, though cannot be released due to the interest being a defined benefit interest.

Section D: Super fund details

14 Super fund name BRUCE DAVEY RETIREMENT FUND

15 Super fund ABN 56579064708

Section E: Declaration

Complete the declaration that applies to you.

Penalties may be imposed for giving false or misleading information.

TRUSTEE, DIRECTOR OR AUTHORISED OFFICER DECLARATION

I declare that:

- the information contained in the statement is true and correct
- where an amount has been paid, it has been released from account(s) held by the member.

Name (Print in BLOCK LETTERS)

Form for Name (Print in BLOCK LETTERS)

Signature

Form for Signature

Date Day Month Year

Contact number

OR

AUTHORISED REPRESENTATIVE DECLARATION

I, the authorised representative of the super provider, declare that:

- I have prepared the statement with the information supplied by the super provider
- I have received a declaration made by the super provider that the information provided to me for the preparation of this statement is true and correct
- I am authorised by the super provider to give the information in the statement to the ATO.

Name (Print in BLOCK LETTERS)

Form for Name (Print in BLOCK LETTERS)

Signature

Form for Signature

Date Day Month Year

Contact number

Tax agent number (if applicable)

Privacy

The ATO is a government agency bound by the Privacy Act 1988 in terms of collection and handling of personal information and tax file numbers (TFNs). For further information about privacy law notices please go to ato.gov.au/privacy



THE TRUSTEE FOR BRUCE DAVEY RETIREMENT
FUND
UNIT 1202 225 ELIZABETH ST
MELBOURNE VIC 3000

Our reference: 7127804206213

Phone: 13 10 20

ABN: 56 579 064 708

11 March 2022

Authority to release benefits due to Division 293 due and payable

Dear Trustee,

This is an authority to release benefits for BRUCE DAVEY due to Division 293 due and payable. They have requested that \$1,867.30 be released from their superannuation account. The released amount is to be paid to the ATO.

What you need to do

THE TRUSTEE FOR BRUCE DAVEY RETIREMENT FUND is required within 20 business days of the date of this letter to:

- › make a payment to us of the **lesser** of either:
 - \$1,867.30 or
 - the sum of all available release amounts for each super interest held by you for BRUCE DAVEY.
- › If you can't release the full amount, please specify your reason, and
- › return the enclosed statement to us.

You don't need to amend the contributions report you provided for this member in your SMSF annual return or member account transaction service (MATS). Releasing this benefit doesn't change the contributions you previously reported.

Need help

If you have any questions, please phone **13 10 20** between 8:00am and 6:00pm, Monday to Friday.

Yours faithfully,
Grant Brodie
Deputy Commissioner of Taxation

PAY NOW

**Your payment reference
number (PRN) is:**
551001907622526611

BPAY®



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Telephone & Internet Banking - BPAY®

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CREDIT OR DEBIT CARD

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OTHER PAYMENT OPTIONS

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Release authority statement

11 March 2022

You must:

- complete section B **and** if required section C
- sign and date the declaration (section E) that applies to you, and
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mail to

Australian Taxation Office
PO Box 3578
ALBURY NSW 2640

OR fax individually to

1300 139 024

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

S M I T H S T

- Place χ in ALL applicable boxes.

You must return this statement to us within 20 business days of the issue date on the enclosed letter.



Section A: Member details

- | | | | |
|---|----------------------------------|------------------------|--|
| 1 | Title | MR | |
| 2 | Family name | DAVEY | |
| 3 | First given name | BRUCE | |
| 4 | Member TFN | 190762252 | |
| 5 | Member account number | 1 | |
| 6 | Member identifier number | | |
| 7 | Unique superannuation identifier | | |
| 8 | Year of assessment | 2019 - 20 | |
| 9 | Payment reference number | 5510 0190 7622 5266 11 | |

Section B: Details of payment

Complete this section detailing the amount paid and if required the amount unable to be released from your member's super interest.

The amount to be paid to the ATO is \$ 1,867.30

- 10 Amount paid** \$, , .

Day Month Year

11 Date amount paid / /

12 Amount unable to be released \$, , .

(Complete **section C** if there is an amount unable to be released)

Section C: Reason for not releasing money

Complete this section if you cannot pay the full amount from your member's super interests.

13 Reason for non-release or partial release (Place an X in the applicable box)

- ☐ The member does not have sufficient funds available or no longer has any super interests within this fund.
- ☐ The member has funds available, though cannot be released due to the interest being a defined benefit interest.

Section D: Super fund details

14 Super fund name THE TRUSTEE FOR BRUCE DAVEY RETIREMENT FUND

15 Super fund ABN 56579064708

Section E: Declaration

Complete the declaration that applies to you.

Penalties may be imposed for giving false or misleading information.

TRUSTEE, DIRECTOR OR AUTHORISED OFFICER DECLARATION

I declare that:

- the information contained in the statement is true and correct
- where an amount has been paid, it has been released from account(s) held by the member.

Name (Print in BLOCK LETTERS)

[Grid for Name input]

Signature

[Signature box]

Date [Day] [Month] [Year]

Contact number [Grid for Contact number input]

OR

AUTHORISED REPRESENTATIVE DECLARATION

I, the authorised representative of the super provider, declare that:

- I have prepared the statement with the information supplied by the super provider
- I have received a declaration made by the super provider that the information provided to me for the preparation of this statement is true and correct
- I am authorised by the super provider to give the information in the statement to the ATO.

Name (Print in BLOCK LETTERS)

[Grid for Name input]

Signature

[Signature box]

Date [Day] [Month] [Year]

Contact number [Grid for Contact number input]

Tax agent number (if applicable) [Grid for Tax agent number input]

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