

Rollover benefits statement

Section A: Receiving fund

Australian business number (ABN)

86364988986

Fund name

Regan and Ross Superfund

Postal address

194 Quinns Hill Rd West

Suburb/town

STAPYLTON

State/territory

QLD

Postcode

4207

Country if other than Australia

Unique superannuation identifier (USI)

Member client identifier

001

Section B: Member's details

Tax file number (TFN)

202150780

Full name

Title: Mr ☒ Mrs ☐ Miss ☐ Ms ☐ Other

Family name

Caruso

First given name

Ross

Other given names

Clifford

Residential address

194 Quinns Hill Rd West

Suburb/town

Stapylton

State/territory

QLD

Postcode

4207

Country if other than Australia

Day Month Year

Date of birth

01 November 1977

Sex

Male ☒

Female ☐

Daytime phone number (include area code)

0413297195

Email address (if applicable)

rosscaruso@msn.com

Section C: Rollover transaction details

Day Month Year

Service period start date

19 January 1994

Tax components

Tax-free component

\$ \$15,797.80

Taxable component:

Element taxed in the fund

\$ \$149,202.20

Element untaxed in the fund

\$ \$0.00

Tax components TOTAL

\$ \$165,000.00

Preservation amounts

Preserved amount

\$ \$164,851.53

Restricted non-preserved amount

\$ \$0.00

Unrestricted non-preserved amount

\$ \$148.47

Preservation amounts TOTAL

\$ \$165,000.00

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

23053121564

Fund name

LGIAsuper

Contact name

Title:

Mr

☒

Mrs

☐

Miss

☐

Ms

☐

Other

Contact name

PETER CHARLES GAMIN

Daytime phone number (include country and area codes)

1800 444 396

Email address (if applicable)

Section F: Declaration

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.

Name (BLOCK LETTERS)

PETER CHARLES GAMIN

Authorised representative signature

PETER CHARLES GAMIN

Date

Day Month Year

30 July 2018