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THE TRUSTEE FOR STEPHEN TURNER 67 SMSF
15 KALLAMURRA ST
HALLETT COVE SA 5158

Our reference: 7130949704115
Phone: 13 10 20

12 July 2022

Please send all your future superannuation fund information to us

Dear Sir/Madam

Thank you for notifying us of your choice to make THE TRUSTEE FOR STEPHEN TURNER 67 SMSF a regulated self-managed superannuation fund (SMSF).

As we are responsible for regulating this type of fund, all information you provide about THE TRUSTEE FOR STEPHEN TURNER 67 SMSF, including your SMSF annual return, needs to be sent to us.

We look forward to helping you with any other regulatory and taxation issues that may relate to your fund. On the back of this letter, you'll find some guidance and useful links for running a SMSF.

If you have any questions, please call us on **13 10 20** between 8.00am and 6.00pm, Monday to Friday. We'll be happy to help.

Yours faithfully

Grant Brodie
Deputy Commissioner of Taxation

What are my responsibilities as a fund trustee?

Generally, all members of self managed superannuation funds must also be the fund's trustees. Trustees have certain legal obligations and duties to fulfill.

One of your key responsibilities as a fund trustee will be to ensure that your fund meets the requirements of the *Superannuation Industry (Supervision) Act 1993* and related regulations (the *Superannuation Industry (Supervision) Regulations 1994*).

This includes informing us if any trustees or members join or leave the fund. You can do this at **www.abr.gov.au** or by lodging a *Change of details for superannuation entities* (NAT 3036) form, which can be ordered from our publication service on **1300 720 092**.

Where can I get more information?

If you would like more information about self managed superannuation funds, you can:

- go to our website at **www.ato.gov.au/smsf**, or
- contact us by phoning **13 10 20** between 8.00am and 6.00pm, Monday to Friday.

TRANSFER OF ASSETS INSTRUCTION FORM

Important! Use this form only for in-specie transfers of unit trusts or OEICs to the receiving fund

THE RECEIVING FUND:

TURBO TURNER SUPER FUND PTY LTD

ACN (Australian company number)
660651490

AS TRUSTEE FOR:
STEPHEN TURNER 67 SMSF
QROPS:

ABN (Australian business
number)

15 KALLAMURRA STEET, HALLETT COVE,
SA, 5158
[telephone contact]
[email address]

Instructions to member of fund

This form is your authority to transfer the assets referred to in specie from your existing pension provider to your overseas registered pension scheme. Do not use this form for a transfer of cash or stocks and shares. This form should only be used for in-specie transfers of unit trusts and OEICs.

You must complete all of the details requested on the form and sign the request for transfer. Then please give the form to your overseas registered pension scheme (the receiving fund) at the address given above.

Instructions to delivering fund

If you require any further forms to be completed by the transferring member please contact the member directly.

For all transfers please provide us with full details of the benefits being transferred and confirm:

- That the transferring scheme is a registered pension scheme under the Finance Act 2004.
- The transferring scheme's HMRC Pension Scheme Tax Reference.
- The total transfer value.
- Full details of any rights or benefits which might affect the right to make this transfer or its value.

Full name of member	
Date of birth	
Reference number in receiving fund (if any)	
Tax File Number*	
Transferring scheme name	
Transferring scheme account number	
Address of transferring scheme	
Transferring broker/manager's name	
Transferring broker/manager's account number	
Address of transferring broker/manager (if different from address of scheme)	
Is the transferring scheme a final salary pension scheme?	

LIST OF UNIT TRUSTS/OEICs TO BE TRANSFERRED

Please now complete the request for transfer on the next page

REQUEST FOR TRANSFER

- I request the scheme administrator of the transferring scheme to transfer the value of my benefits under the transferring scheme to the receiving scheme in the form of an in-specie transfer of assets held on my behalf (after deduction of any outstanding liabilities or charges) to the receiving scheme.
- Where appropriate, the receiving scheme will advise details of the nominee/ parties to whom assets must be transferred.
- I understand that the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaims and realising all such rights and entitlements in respect of the assets transferred and for passing them on to the receiving scheme.
- I authorise the scheme administrator, provider or insurer of the transferring scheme to provide the receiving scheme with any information they request regarding my benefits under the transferring scheme.
- I agree that a copy of this authority should have the validity of the original.
- I apply to the trustee of the receiving scheme, to accept the transfer from the transferring scheme and to pay it into my super fund.
- I confirm that the information provided relevant to my application to transfer benefits into my super fund is correct and complete, to the best of my knowledge and belief.
- I confirm that I have not received any advice or recommendation in relation to the transfer from the transferring scheme or the receiving scheme.

Signed (Member's Signature)

Print name:

Dated:

The receiving fund is an Australian superannuation fund governed by the Superannuation Industry (Supervision) Act 1993 and regulations made thereunder. It is registered with and supervised by the Australian Tax Office. It is authorised by the Australian Tax Office to receive transfers of assets and money from foreign pension funds on behalf of its members. The trustee of the fund is a company incorporated in Australia. The fund is a Qualifying Registered Overseas Pension Scheme registered with HM Revenue and Customs.