

# 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

SCHOONENBERG SUPERANNUATION FUND

#### 2 Postal address

29 MACKAY CL  
SORRENTO QLD 4217

#### 3 Australian business number (ABN) or withholder payer number

16034911728

#### 4 Authorised contact person

MARIANNE SCHOONENBERG

#### 5 Daytime phone number

07 55383376

### Section B: Member's details

#### 6 Full name

Title MS

Family Name

SCHOONENBERG

First given name

Other given names

MARIANNE

#### 7 Postal address

29 MACKAY CL  
SORRENTO QLD 4217

#### 8 Date of birth

03/01/1955

Section C: Superannuation lump sum payment details

9 Lump sum payment is calculated to this date 10/03/2017

10 Superannuation lump sum components

Taxable component

Taxed element	\$ 26,151.87
Untaxed element	\$
Tax-free component	\$ 393,573.13
KiwiSaver tax-free component	\$
Total amount	\$ 419,725.00

11 Preservation amounts of the superannuation lump sum

Preserved amount	\$
Restricted non-preserved amount	\$
Unrestricted non-preserved amount	\$ 419,725.00
Total amount	\$ 419,725.00

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 / /


---

## 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)

JS SUPERANNUATION FUND

3 Fund ABN

94450178283

4 Superannuation fund, ADF, RSA or annuity provider postal address:

1101/14 GEORGE AVE  
BROADBEACH QLD 4218

5 Member account number

6 Roll over an amount of:

\$ 419,725.00

---

## Section G: Member's declaration

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

MARIANNE  
SCHOONENBERG

Signature

Date

/ /

Give this completed statement to your super fund. You should keep a copy for your records for a period of five years.

# Rollover benefits statement

Complete this form if:

- you are a trustee of a super fund, and
- a member asks you to roll over a benefit payment for them.

**!** If a member asks you to roll over parts of their entitlement to more than one fund, you must complete separate statements for each rollover payment.

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

## Section A: Receiving fund

1 Australian business number (ABN)

94450178283

2 Fund name

JS SUPERANNUATION FUND

3 Postal address

1101/14 GEORGE AVE  
BROADBEACH QLD 4218

4 You must provide at least one of the receiving fund's numbers below :

(a) Unique superannuation identifier (USI)

(b) Member client identifier

## Section B: Member's details

5 Tax File Number (TFN)

192087906

6 Full name

Title MS

Family Name

SCHOONENBERG

First given name

Other given names

MARIANNE

7 Residential address

29 MACKAY CL  
SORRENTO QLD 4217

8 Date of birth

03/01/1955

9 Sex

F

10 Daytime phone number (include area code)

07 55383376

11 Email address (if applicable)

Section C: Rollover transaction details

12 Service period start date

16/06/1997
------------

13 Tax components

Tax-free component

\$	393,573.13
----	------------

KiwiSaver tax-free component

\$	
----	--

Taxable component:

Element taxed in the fund

\$	26,151.87
----	-----------

Element untaxed in the fund

\$	
----	--

Tax components TOTAL

\$	419,725.00
----	------------

14 Preservation amounts

Preserved amount

\$	
----	--

KiwiSaver preserved amount

\$	
----	--

Restricted non-preserved amount

\$	
----	--

Unrestricted non-preserved amount

\$	419,725.00
----	------------

Preservation amounts TOTAL

\$	419,725.00
----	------------

Section D: Non-complying funds

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

\$	
----	--

Section E: Transferring fund

16 Fund ABN

16034911728

17 Fund name

SCHOONENBERG SUPERANNUATION FUND

18 Contact name

MARIANNE SCHOONENBERG

19 Daytime phone number (include area code)

Telephone No

07 55383376

20 Email address (if applicable)

Signature of authorised person

Date

/ /

You do not need to send a copy of the statement to the ATO however, you must keep a copy for your records for a period of five years.

# PAYG Payment Summary - Superannuation Lump Sum

## Payment summary for year ending 30 June 2017

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.

### Payee Details

Payee's surname or family name

SCHOONENBERG

Payee's given name(s)

MARIANNE

Payee's address

29 MACKAY CL

SORRENTO QLD 4217

Date of birth

03/01/1955

**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](http://www.ato.gov.au) - refer to TaxPack - phone 13 28 61

Date of payment

10/03/2017

Payee's Tax File Number

192087906

Total Tax withheld

\$

### Taxable component

Taxed element

26,151

Untaxed element

Tax free component

393,573

KiwiSaver tax-free component

Death benefit

Type of death benefit

### Payer Details

Payer's ABN or Withholder Payer Number

16034911728

Branch Number

Payer's Name

SCHOONENBERG SUPERANNUATION FUND

Signature of authorised person

Date

/ /