

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)

65714394898

2 Fund name

AUSTRALIANSUPER

3 Postal address

GPO BOX 1901
MELBOURNE VIC 3001

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

(a) Unique superannuation identifier (USI)

STA 0100AU

(b) Member client identifier

1072 060 221

Section B: Member's details

5 Tax File Number (TFN)

363650299

6 Full name

Title

DR

Family Name

LE COUTEUR

First given name

Other given names

NICOLA

7 Residential address

U19 COMMODORE CRESCENT
MCMAHONS POINT NSW 2060

8 Date of birth

18/07/1959

9 Sex

F

10 Daytime phone number (include area code)

0422 413 868

11 Email address (if applicable)

nicola@bsbconsulting.com.au

Section C: Rollover transaction details

12 Service period start date

11/01/2011

13 Tax components

Tax-free component

\$ 25,501.35

KiwiSaver tax-free component

\$

Taxable component:

Element taxed in the fund

\$ 29,498.65

Element untaxed in the fund

\$

Tax components TOTAL

\$ 55,000.00

14 Preservation amounts

Preserved amount

\$ 55,000.00

KiwiSaver preserved amount

\$

Restricted non-preserved amount

\$

Unrestricted non-preserved amount

\$

Preservation amounts TOTAL

\$ 55,000.00

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

69 857 901 651

17 Fund name

JONES SUPERANNUATION FUND

18 Contact name

NICOLA LE COUTEUR

19 Daytime phone number (include area code)

Telephone No

0422 413 868

20 Email address (if applicable)

nicola@bsbconsulting.com.au

Signature of authorised person

McCauley

Date

17/11/20

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.