



Release authority statement

11 June 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.

COPY
ORIGINAL IN POST
24.6.21
2 PAGES



Section A: Member details

- 1 Title MR
- 2 Family name BRIGGS
- 3 First given name DAVID
- 4 Member TFN 112568067
- 5 Member account number SMSF115408150872
- 6 Member identifier number
- 7 Unique superannuation identifier
- 8 Year of assessment 2017 - 18
- 9 Payment reference number 5510 0112 5680 6783 91

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 \$ 39,798.21

10 Amount paid \$, 39 , 798 . 21

11 Date amount paid Day Month Year
25 / 06 / 2021

Via B:POY

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 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 BRIGGS SERVICES PTY LIMITED
SUPERANNUATION FUND

15 Super fund ABN 65752742097

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)

DAVID BRIGGS

Signature



Date

Day

Month

Year

23 / 06 / 2021

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)

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

23.6.21

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Australian Government
Australian Taxation Office

F 001810



THE TRUSTEE FOR BRIGGS SERVICES PTY LIMITED
SUPERANNUATION FUND
91 MIDDLE HEAD RD
MOSMAN NSW 2088

Our reference: 7122250842764

Phone: 13 10 20

ABN: 65 752 742 097

11 June 2021

Authority to release benefits due to excess non-concessional contributions

Dear Trustee,

This is an authority to release benefits for DAVID BRIGGS due to excess non-concessional contributions. They have requested that \$39,798.21 be released from their superannuation account. The released amount is to be paid to the ATO.

What you need to do

THE TRUSTEE FOR BRIGGS SERVICES PTY LIMITED SUPERANNUATION FUND is required within 20 business days of the date of this letter to:

- > make a payment to us of the **lesser** of either:
 - \$39,798.21 or
 - the sum of all available release amounts for each super interest held by you for DAVID BRIGGS.
- > 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 contributions statement (MCS). 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

ATO -
Tel 1300 898 089
1800

B/PAY from 160546
25.6.21

PAY NOW

Your payment reference number (PRN) is:
551001125680678391

BPAY®



Bill code: 75556
Ref: 551001125680678391

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

5-7-21



Australian Government
Australian Taxation Office



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MR DAVID A BRIGGS
C/- RBW ACCOUNTANTS
GPO BOX 7089
SYDNEY NSW 2001

Our reference: 7110604680350
Phone: 13 10 20
TFN: 112 568 067

16 May 2019

You made excess non-concessional (after tax) superannuation contributions in 2017-18

Dear MR BRIGGS

There is a cap on the amount of non-concessional (after tax) contributions you can make to your super each financial year without having to pay extra tax.

Your cap is zero because your total superannuation balance was \$1,600,000.00 or greater on the 30 June 2017.

In the 2017-18 financial year, you have contributed more than the cap and you need to decide what to do with your excess amounts.

Your determination

Your Total Superannuation Balance at 30 June 2017	\$2,514,578.87
Non-concessional contributions cap	\$0.00
Non-concessional contributions	\$34,568.16
Excess non-concessional contributions for this determination	\$34,568.16
Excess non-concessional contributions tax (option 2)	\$16,247.03
Associated earnings amount	\$6,153.00
Associated earnings period	1 July 2017 to 16 May 2019
Associated earnings rate	8.73%
85% of Associated earnings amount	\$5,230.05
Amount to be released from your super fund(s) (option 1)	\$39,798.21

ATO will pay back \$37,710.91 on 7-7-21 !

Further information

Associated earnings

The associated earnings amount is calculated on your excess non-concessional contributions amount and is to recognise that the excess amount has benefited from investment in your super fund(s).

For more information about associated earnings, visit our website, www.ato.gov.au/associatedearnings

Objection rights

You can write to us and object to the assessment if you disagree with the determination.

For more information about objections, visit our website, www.ato.gov.au/objections

If you disagree with our decision on your objection you can apply for an independent, external review. When we give you our decision we will let you know if you can apply to the Administrative Appeals Tribunal for a review or appeal to the Federal Court.