

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

BJ & ME TRUSCOTT SUPER FUND

2 Postal address

16-22 CAMPASPE DRIVE

Suburb/town/locality

AXEDALE

State/territory

VIC

Postcode

3551

3 Australian business number (ABN) or withholder payer number

36963616552

4 Authorised contact person

Title:

Family name

First given name

Other given names

5 Daytime phone number (include area code)

Section B: Member's details

6 Your full name

Title:

MR

Family name

TRUSCOTT

First given name

Other given names

BRIAN

7 Current postal address

16-22 CAMPASPE DRIVE

Suburb/town/locality

AXEDALE

State/territory

VIC

Postcode

3551

8 Date of birth

11 AUGUST 1954

Section C: Superannuation lump sum payment details

9 Lump sum payment is calculated to this date

10 Superannuation lump sum components

Taxable component

Taxed element	\$	<input type="text" value="1925.57"/>
Untaxed element	\$	<input type="text"/>

Tax-free component

	\$	<input type="text"/>
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Total amount

	\$	<input type="text" value="1925.57"/>
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11 Preservation amounts of the superannuation lump sum

Preserved amount	\$	<input type="text"/>
Restricted non-preserved	\$	<input type="text"/>
Unrestricted non-preserved	\$	<input type="text" value="1925.57"/>
Total amount	\$	<input type="text" value="1925.57"/>

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

	<input type="text" value="15/04/2021"/>
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← **SIGN HERE** Date

PART 2 – MEMBER TO COMPLETE

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)**

3 **Fund ABN**

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

Suburb/town/locality

State/territory

Postcode

5 **Member account number**

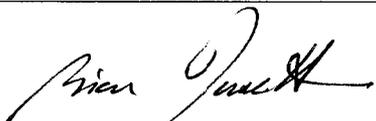
6 **Roll over an amount of:** \$

Section G: Member's declaration

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

Name (print in block letters)

Signature



**← SIGN
HERE**

Date

! You should keep a copy of the statement for your records for a period of five years.

PAYG Payment Summary - Superannuation Lump Sum

Payment summary for year ending 30 June 2021

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.

Section A: Payee details

Tax file number

Surname or family name

Given name(s)

Residential address

Suburb/town/locality

State/territory

Postcode

Date of birth (if known)

Section B: Payment details

Date of payment

TOTAL TAX WITHHELD \$

Taxable component

Taxed element \$

Untaxed element \$

Tax-free component \$

Is this payment a death benefit? No Yes

Type of death benefit Trustee of deceased estate or Non-dependant

Section C: Payer details

i You **must** also complete this section

Australian business number (ABN) or withholding payer number (WPN)

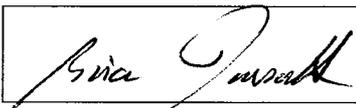
Branch number

Name (use the same name that appears on your activity statement)

Privacy – For information about your privacy visit our website at ato.gov.au/privacy

DECLARATION – I declare that the information given on this form is complete and correct.

Signature of authorised person



← SIGN HERE

Date

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