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## Crystallisation calculator

Version 1.3.1

## Crystallisation calculator results – 08 February 2013

Member's name:

Barry

Fund's name:

Albrecht Super Fund

## Based on the information supplied, the crystallisation details are:

• Pre 1 July 1983 days:	2265
• Post 30 June 1983 days:	8766
• Crystallised pre 1 July 1983 amount	\$28,824.26
• Crystallised undeducted contributions	\$16,000.00
• Crystallised CGT Exempt component	\$104,000.00
• Crystallised Concessional component	<u>\$2,756.52</u>

Total Crystallised Segment amount

\$151,580.78

Tax free

## You provided the following information

• Eligible service period	Start date	End date
	18 April 1977	30 June 2007
• Superannuation interest	\$247,136.40	
• Undeducted contributions	\$16,000.00	
• Post-June 94 Invalidation component	\$0.00	
• CGT Exempt component	\$104,000.00	
• Concessional component	\$2,756.52	

## What to do next

- To change any data select the **Back** button on the browser.
- To print the report select the **Print** option on the browser.
- Keep a copy of the report for your records.

## Notes and disclaimers

- These calculations are based on the information you have provided.
- The calculator does not identify reporting obligations.

## Provide feedback

We would appreciate your feedback on this tool. It should take you around one minute to complete and will help us improve our service.

Restart

Finish



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## Crystallisation calculator

Version 1.3.1

## Crystallisation calculator results – 08 February 2013

Member's name: Susan Fund's name: Albrecht Super Fund

## Based on the information supplied, the crystallisation details are:

• Pre 1 July 1983 days:	0
• Post 30 June 1983 days:	6482
• Crystallised pre 1 July 1983 amount	\$0.00
• Crystallised undeducted contributions	\$12,280.00
• Crystallised CGT Exempt component	\$104,000.00
<b>Total Crystallised Segment amount</b>	<b><u>\$116,280.00</u></b>

Tax free

## You provided the following information

• Eligible service period	Start date	End date
	01 October 1989	30 June 2007
• Superannuation interest	\$211,148.92	
• Undeducted contributions	\$12,280.00	
• Post-June 94 Invalidity component	\$0.00	
• CGT Exempt component	\$104,000.00	
• Concessional component	\$0.00	

## What to do next

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## Provide feedback

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**Restart****Finish**

# ETP Rollover Advice Statement

Roll-over fund copy

t0001297a-3848651-0000002

## Section 1 - Rollover and fund name and address

Af Super P/L Atf Albrecht Fam S/F  
C/-John Fisher Fin Services  
Gpo Box 396  
DARWIN NT 0801

Payee SFN   
Payee ABN   
Payee SPIN

## Section 2 - Individual's details

### Individual's full name

Title  Mr  Su name or family name  Albrecht  
First given name  Barry  
Other given names  Robert  
Address  PO Box 843  
 Humpty Doo  State  NT  Postcode  836  
Date of birth  23/07/1951  Sex (M/F)  M  Tax File Number  477845256

Name and address of  
authorised agent or  
adviser (if any)

State  Postcode   
Telephone No.

## Section 3 - Rollover payment details

### ETP components

CGT Exempt component *Tax free*  \$104,000.00  
Undeducted contributions *Tax free*  \$16,000.00  
Concessional component *Taxable*  \$2,756.52  
Pre July and Post June 1983 Taxed element  \$124,379.88  
Post June 1983 Untaxed element  \$0.00  
Post June 1994 Invalidity component  \$0.00

### Eligible Service Period

Date Started  18/04/1977  
Number of days before 1 July 1983  2265  
Number of days after 30 June 1983  8146

### Preservation amounts of the rollover payment

Preserved  \$235,864.79  
Restricted non preserved  \$0.00  
Unrestricted non preserved  \$11,271.61

### Gross amount A

\$247,136.40

### Gross amount B

\$247,136.40

Rollover balance as at 15 February 1990  
Included with this rollover (if known)

\$0.00

The rollover payment relates to  
a Pre July 1994 pension or annuity

Yes ☐ No ☒

### Surcharge information (included in this rollover)

Financial year ending  30/6/2006  
All contributions  \$0.00  
Employer contributions  \$0.00  
Surchargeable amount of  
employer ETPs  \$0.00  
Allocated surplus amount  \$0.00  
Personal contributed amount  \$0.00  
Other contributed amount  \$0.00

## Section 4 - Payment Details

Payer SPIN  FSF0217AU  SFN  472482987  ABN  26458298557

Payer's name  Colonial First State FirstChoice Personal Super  
Contact name  Nigel McCammon  Telephone no.  13 13 36  
Signature of authorised person  Nigel McCammon  Date  18 October 2005

THIS FORM DOES NOT HAVE TO BE INCLUDED IN A TAX RETURN

**Colonial**  
First State

# ETP Rollover Advice Statement

Roll-over fund copy

t0001297a-3848651-0000001

## Section 1 - Rollover and fund name and address

Af Super P/L Atf Albrecht Fam S/F  
C/-John Fisher Fin Services  
Gpo Box 396  
DARWIN NT 0801

Payee SFN

Payee ABN

Payee SPIN

## Section 2 - Individual's details

### Individual's full name

Title  Surname or family name   
First given name   
Other given names   
Address   
 State  Postcode   
Date of birth  Sex (M/F)  Tax File Number   
Name and address of authorised agent or adviser (if any)   
 State  Postcode   
Telephone No.

## Section 3 - Rollover payment details

### ETP components

CGT Exempt component   
Undeducted contributions   
Concessional component   
Pre July and Post June 1983 Taxed element   
Post June 1983 Untaxed element   
Post June 1994 Invalidity component

### Eligible Service Period

Date Started   
Number of days before 1 July 1983   
Number of days after 30 June 1983

### Preservation amounts of the rollover payment

Preserved   
Restricted non preserved   
Unrestricted non preserved

### Gross amount A

### Gross amount B

Rollover balance as at 15 February 1990  
Included with this rollover (if known)

The rollover payment relates to  
a Pre July 1994 pension or annuity

Yes  No

### Surcharge information (included in this rollover)

Financial year ending   
All contributions   
Employer contributions   
Surchargeable amount of employer ETPs   
Allocated surplus amount   
Personal contributed amount   
Other contributed amount

## Section 4 - Payment Details

Payer SPIN

SFN

ABN

Payer's name

Contact name

Telephone no.

Signature of authorised person

Date

THIS FORM DOES NOT HAVE TO BE INCLUDED IN A TAX RETURN

**Colonial**  
First State

**JONES FAMILY SUPERANNUATION FUND**  
**BALANCE FORWARD REPORT AS AT 01/07/2007**

**Account 501: JOHN JONES**

**Balance Details as at 30/06/2007**

		<b>Days</b>	
CGT Exempt	104,000.00	Pre 1/7/83	2,265
Non Qualifying		Pos: 6/83 Taxed	8,766
Undeducted Contribution	16,000.00		
Post June 1994			
Concessional	2,756.52		
Pre Jul 1983	28,824.26		
Post 6/83 Taxed	95,555.62		
Post 6/83 Untaxed			
Total	247,136.40		

**Member Balance Forward Entries**

<b>A/C Code</b>	<b>Account Name</b>	<b>Debit</b>	<b>Credit</b>
501/001	Opening Balance - Preserved/Taxable	124,379.88	
501/001	Opening Balance - Preserved/Taxable		95,555.62
501/002	Opening Balance - Preserved/Tax Free	122,756.52	
501/002	Opening Balance - Preserved/Tax Free		151,580.78
<b>Total</b>		247,136.40	247,136.40

**Balance details as at 01/07/2007**

Total Tax Free Component	151,580.78
Total Taxable Component	95,555.62
Total	247,136.40

Tested on dummy Fund. ↑

**JONES FAMILY SUPERANNUATION FUND**  
**BALANCE FORWARD REPORT AS AT 01/07/2007**

**Account 502: JENNIFER JONES**

**Balance Details as at 30/06/2007**

		<b>Days</b>	
CGT Exempt	104,000.00	Pre 1/7/83	
Non Qualifying		Post: 6/83 Taxed	6,482
Undeducted Contribution	12,280.00		
Post June 1994			
Concessional			
Pre Jul 1983			
Post 6/83 Taxed	94,868.92		
Post 6/83 Untaxed			
Total	211,148.92		

**Member Balance Forward Entries**

<b>A/C Code</b>	<b>Account Name</b>	<b>Debit</b>	<b>Credit</b>
502/001	Opening Balance - Preserved/Taxable	94,868.92	
502/001	Opening Balance - Preserved/Taxable		94,868.92
502/002	Opening Balance - Preserved/Tax Free	116,280.00	
502/002	Opening Balance - Preserved/Tax Free		116,280.00
<b>Total</b>		211,148.92	211,148.92

**Balance details as at 01/07/2007**

Total Tax Free Component	116,280.00
Total Taxable Component	94,868.92
<b>Total</b>	<b>211,148.92</b>