



Australian Government  
Australian Taxation Office

Superannuation lump sum schedule

Use the information on your payment summaries to complete this form.

^XXX

WHEN COMPLETING THIS FORM

- Print clearly in BLOCK LETTERS using a black or blue pen.
- Place  in ALL applicable boxes.



Income year

Use only four digits, for example, for income year 2014–15 write 2015.

Payee's details

Full name

Title:

Tax file number (TFN)

See the Privacy note in the Taxpayer's declaration.

Payment details

Date of payment

Tax withheld

Taxable component

Taxed element

Untaxed element

Is this payment a death benefit?

Payer's Australian business number (ABN)

Date of payment

Tax withheld

Taxable component

Taxed element

Untaxed element

Is this payment a death benefit?

Payer's Australian business number (ABN)



**Date of payment**   /   /

**Tax withheld** \$    ,    .

**Taxable component**

Taxed element \$    ,    .

Untaxed element \$    ,    .

**Is this payment a death benefit?** No ☐ Yes ☐

**Payer's Australian business number (ABN)**

**Date of payment**   /   /

**Tax withheld** \$    ,    .

**Taxable component**

Taxed element \$    ,    .

Untaxed element \$    ,    .

**Is this payment a death benefit?** No ☐ Yes ☐

**Payer's Australian business number (ABN)**

## Taxpayer's declaration

If the schedule is not lodged with the income tax return you are required to sign and date the schedule.

### Important

Before making this declaration check to ensure that all the information required has been provided on this form and any attachments to this form, and that the information provided is true and correct in every detail. If you are in doubt about any aspect of the tax return, place all the facts before the ATO. The income tax law imposes heavy penalties for false or misleading statements.

### Privacy

The ATO is authorised by the *Taxation Administration Act 1953* to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However if you do not provide your TFN, your assessment may be delayed.

Taxation law authorises the ATO to collect information and disclose it to other government agencies. For information about your privacy go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

*I declare that the information on this form is true and correct.*

Signature

Date   /   /

Contact name

Daytime contact number (include area code)



When you have completed the schedule attach it to page 3 of your tax return.

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