



**8 Are you receiving a superannuation pension?**

No  Yes  Please provide the following details

What amount did you contribute to your superannuation fund or retirement savings account (RSA) after 30 June 1983? \$ ,·  
 (Your superannuation fund can provide this information).

What part of this amount did you not claim as a tax deduction? \$ ,·

Have you rolled over any capital gains tax (CGT) exempt amounts to your superannuation fund or RSA account? No  Yes  What amount? \$ ,·

**9 Are you receiving a superannuation pension:**  
 ■ from a fund, which has not had tax paid on contributions received (such as some government funds), or  
 ■ that commenced before 1 July 1994?

No  Yes  Please provide the following details

What amounts did you contribute towards your superannuation fund before 1 July 1983? \$ ,·

For what part of this amount did you not claim a tax deduction or tax offset? \$ ,·  
 We can supply this figure if you don't have it.

**10 If you are receiving a superannuation pension or an annuity that you bought with one or more eligible termination payments (ETP) what amount of each component did you roll over into the superannuation pension or annuity?**

- CGT exempt component \$ ,·
- Undeducted contributions \$ ,·
- Concessional component \$ ,·
- Pre-July 1983 component \$ ,·
- Post-June 1983 untaxed element \$ ,·
- Post-June 1983 taxed element \$ ,·
- Post-June 1994 invalidity component \$ ,·

**11 Did you purchase the superannuation pension or annuity that you are now receiving solely by rolling over a previous superannuation pension or annuity?**

No  Yes  When did the previous superannuation pension or annuity commence? Day:  / Month:  / Year:

**12 If you are receiving an annuity that you purchased with money that did not come from an ETP, how much did you pay for the annuity?**

\$ ,·

**13 (a) Is the period that you will be receiving the superannuation pension or annuity fixed?**

No  Yes  How long is the period?  Months  Years

**(b) What are the conditions under which the payments are made?**




## Section C: Checklist

**20 Are you currently or have you ever been subject to an audit by us on the issues raised by this private ruling request, or have you been notified of a proposed audit?**

- No  Yes  Please provide details of:
- our reference number/s, and
  - the name/s of our officer/s conducting the audit.


**21 Have you previously sought an oral or written ruling for this issue?**

- No  Yes  Please provide details of:
- our reference number/s, and
  - the date/s of the ruling/s.


**22 What income years do you want the private ruling to cover?**

(Include the start and end date/s. For example 1 July 2005 to 30 June 2006.)

Day	Month	Year	to	Day	Month	Year
□□	/ □□	/ □□□□		□□	/ □□	/ □□□□

**23 Would you like us to amend your assessment/s for the period covered by the private ruling?**

- No  Yes  If so:
- Which income years would you like amended?
    - ❗ Normally you can only amend within two years of the date of the assessment. If you wish to amend outside that time, you will need to lodge an objection and ask for an extension of time to lodge the objection. For more information refer to *How to lodge an objection* (NAT 13470).

Year	Year	Year	Year
A □□□□	B □□□□	C □□□□	D □□□□

- Did you include a deduction in your tax return in relation to this issue?

No  Yes  How much?

A \$ □□□, □□□. □□	B \$ □□□, □□□. □□
C \$ □□□, □□□. □□	D \$ □□□, □□□. □□

- If you did previously include a deduction in your tax return any amendments may not be in your favour. Is there any information you would like to provide to explain how you determined the amount included in your return and what you are doing differently now?

Are there any other circumstances that we should know about in relation to your situation?


