

PROJECT: Form Letters
SSMT-EX04-Pha2ExitLet-V20-V3_catA bsp-v1

<insert date>

PRIVATE & CONFIDENTIAL

<insert customer full name>
<insert address 1>
<insert address 2>
<insert suburb><insert state><insert postcode>

Member Number: <insert member number>

Dear <insert customer first name>,

Re. Your Benefit has been Rolled-over to <insert roll over plan name>

We have sent a cheque for <insert amount> to <insert roll-over plan name>, along with the original copy of the Eligible Termination Payment (ETP) Roll-over Statement.

Please note that this Benefit may still be subject to a Surcharge liability, after a final assessment by the Tax Office. However, this Surcharge will generally not apply if your taxable income is under \$99,710 p.a.

Please pay careful attention to the following documents enclosed and file them with your personal records:

- A Statement of Benefit – with full details of your Benefit
- PAYG Tax Calculation – the calculation of your Benefit and the tax paid
- A copy of your ETP Roll-over Statement – the details of the roll-over of your Benefit.

We are glad to serve you and welcome any queries or questions. Please call our HelpLine on 1800 555 667 or log on to www.yoursupersolution.com.au.

Thank you for having chosen us to help you securely achieve your goals for retirement. You can rely on the consistency, discipline and long term track record of Russell to help you make the most of your super.

Yours Sincerely

For and behalf of the Turstee
Russell SuperSolution