

# SELECT PENSION PLAN TAX GUIDE

July 2016

To help you complete your tax return for the 2015/2016 financial year



## HOW TO USE THIS GUIDE

This guide is designed to help you if you are required to complete the 2016 Tax Return for Individuals.

If you are unsure whether you are required to complete a return, please refer to pages 5-6 of the Individual tax return instructions 2016 ('2016 instruction booklet'). This publication is available from the Australian Taxation Office (ATO) – download it from the ATO website or call 1300 720 092.

The 2016 instruction booklet will refer you to additional information for each item which is available on the ATO website – [www.ato.gov.au/instructions2016](http://www.ato.gov.au/instructions2016).

Our guide provides step-by-step instructions on where you need to include information about your investment in Perpetual Select Pension Plan (the Plan) in your tax return.

You will need to refer to the Plan PAYG Payment Summary – superannuation income stream. You do not need to include this with your tax return but you should keep it with your records.

If you have any questions about your Plan PAYG Payment Summary, please email [selectfunds@perpetual.com.au](mailto:selectfunds@perpetual.com.au) or phone 1800 003 001 during business hours (Sydney time).

### OBTAIN YOUR OWN TAX ADVICE

The information provided in this guide is not tax advice and only relates to your investment in the Plan. The steps provided are not a complete guide to completing your tax return.

We recommend you seek professional assistance when completing your tax return and refer any questions about your tax return to your tax adviser or the ATO. We are not able to provide you with tax advice.

### HOW TO COMPLETE THE 2016 TAX RETURN FOR INDIVIDUALS

There are two questions that you need to complete in relation to your investment in the Plan. The following information explains how to complete these questions.

You should use the 2016 instruction booklet in addition to our guidelines.

#### Question 7 – Australian annuities and superannuation income streams

**Step 1.** See pages 15-16 of the 2016 instruction booklet for the ATO's instructions.

**Step 2.** In the boxes above and to the left of J, write the amount of the 'Total tax withheld' as shown on your Plan PAYG Payment Summary (whole dollars only).

**Step 3.** At J write the 'Taxable component – Taxed element' as shown on your Plan PAYG Payment Summary (whole dollars only).

#### To complete question T2 – Australian superannuation income stream

**Step 1.** See page 41 of the 2016 instruction booklet for the ATO's instructions.

**Step 2.** At S write the 'Tax offset amount' as shown on your Plan PAYG Payment Summary (whole dollars only).

This information was prepared and issued by Perpetual Superannuation Limited (PSL) ABN 84 008 416 831, AFSL 225246, RSE L0003315 as Trustee of the Perpetual Select Pension Plan ABN 51 068 260 563 (the Plan). The information in this guide is based on information published by the Australian Taxation Office. It has been provided in good faith, as general information only and is believed to be accurate at the time of compilation. Perpetual Group means Perpetual Limited ABN 86 000 431 827 and its subsidiaries. No company in the Perpetual Group, or PSL in its capacity as Trustee of the Plan, make any representation or warranty as to the accuracy, reliability or completeness of material in this document. While liability under any statute cannot be excluded, companies in the Perpetual Group and directors, employees and consultants of companies in the Perpetual Group, do not accept any liability (whether arising in contract, tort or negligence or otherwise) for any error or omission in this material or for any loss or damage (whether direct, indirect consequential or otherwise) suffered by the recipient of this information or any other person. The tax information contained in this document is not tax advice and should not be relied on as such. This information is not intended to provide you with advice or take into account your objectives, financial situation or needs. You should consider whether the information is suitable for your circumstances and we recommend you seek professional advice

2360\_SLPTTG4\_0616

### MORE INFORMATION

Investor Services 1800 003 001

Email [selectfunds@perpetual.com.au](mailto:selectfunds@perpetual.com.au)

[www.perpetual.com.au](http://www.perpetual.com.au)

Perpetual