

Australian annuities and superannuation income streams worksheet

Taxpayer's name _____

Tax file number _____

Year ended _____

Address _____

1. Please provide details of any non-superannuation Australian annuities that were received by you during the income year:

	Description of payment	Gross amount (A)	Deductible amount (B)	Assessable Amount (A) - (B)
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
Total to be included at label N of Item 7 of the tax return				_____

2. Please provide details of the "taxable component" of any superannuation income stream benefits received by you during the income year:

	Description of payment	Taxed element	Untaxed element
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
Totals		===== ❶	===== ❷

❶ Show the total of the taxed element amounts at **label J of Item 7** where the recipient is under 60.

❷ Include the total of the untaxed element amounts at **label N of Item 7**.