

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 _____ **1** _____ **2**

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

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