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2020

7 Electronic funds transfer (EFT)

A Fund's financial institution account details

This account is used for super contributions and rollovers. Do not provide a tax agent account here.

Fund BSB number (must be six digits) 017042

Fund Account number 205742973

Fund account name (for example, J&Q Citizen ATF J&Q Family SF)

Kelly Fife Super Fund

We need your self-managed fund's financial institution details to pay any super payments and tax refunds owing to you

Who should complete this annual return?
Only self managed superannuation funds (SMSFs) can complete this annual return.
All other funds must complete the Fund income tax return 2020 (NAT 71287).

he Self-managed superannuation fund annual return 2020 instructions NAT 71606) (the instructions) can assist you to complete this annual return	eum:
ection A: Fund information	
Tax file number (TFN) 853 166 900	To assist processing, write the fund's TFN at the top of pages 3, 5 and 7.
The ATO is authorised by law to request your TFN. You are not obliged to quote your TFN but not quoting it could increase the chance of delay or error in processing your annual return. See the Privacy note in the Declaration.	ged to quote your TFN but not quoting it all return. See the Privacy note in the Declaration.
Name of self-managed superannuation fund (SMSF)	"
Kelly Fife Superannuation Fund	
Australian business number (ABN) (if applicable) 80	80 951 343 160
Current postal address	
P O Box 137	
	TAS Bestode 7002
Suburb of town 1401 to 100 cm.	
Annual return status Is this an amendment to the SMSF's 2020 return? Is this the first required return for a newly registered SMSF?	A No X Yes
SMSF auditor Auditor's name	
True: Mr	
Family name	Suffix
	Other given names
First given name Fakul	Hasan
iditor Number Auditor's	
100260491 04 693/3109	
P O Box 201	
Suburb or town Moorebank State	te NSW Postcode 1875
Day Month Year Day Month Year Day Month Year	
Was Part A of the audit report qualified?	No X Yes
Was Part B of the audit report qualified?	No X Yes
If Part B of the audit report was qualified, have the reported D	No Yes

9 Was the fund wound up during the income year?

Day Month

Year

Have all tax lodgment and payment obligations been met?

₹ _____

Yes

No X Yes I fyes, provide the date on which the fund was wound up

Status of SMSF

Does the fund trust deed allow acceptance of the

Australian superannuation fund A No

Fund benefit structure

B A code

Government's Super Co-contributions and C No Low Income Super Contribution?

Yes X Yes X Electronic service address alias

Kelly Fife Super Fund

Account name (for example, J&Q Citizen ATF J&Q Family SF)

Provide the electronic service address alias (ESA) issued by your SMSF messaging provider. (For example, SMSFdataESAAlias). See instructions for more information.

Financial institution details for tax refunds only

I would like my tax refunds made to this account. Go to C.

This account is used for tax refunds. You can provide a tax agent account here.

017042

Account number | 205742972

BSB number (must be six digits)

10 Exempt current pension income

Did the fund pay an income stream to one or more members in the income year?

To claim a tax exemption for current pension income, you must pay at least the minimum benefit payment under the law. Record exempt current pension income at Label A

Did the fund have any other income that was assessable?

Unsegregated assets method C Segregated assets method B

Was an actuarial certificate obtained? D Yes

Yes S

Go to Section B: Income

Choosing 'No' means that you do not have any assessable income, including no-TFN contributions. Go to Section C: Deductions and non-deductible expenses. (Do **not** complete Section B: Income)

If you are entitled to claim any tax offsets, you can list these at Section D: Income tax calculation statement.

Yes

Exempt current pension income amount A \$

Z

Which method did you use to calculate your exempt current pension income?

No X Go to Section B. Income

PAGE 1

PAGE 2

IN-CONFIDENCE - when completed

D1 \$

D3 \$

D2 \$

C2 \$

Ω \$

Rebates and tax offsets

Complying fund's franking credits tax offset	Refundable tax offsets 🗜	\$
9		(E1 plus E2 plus E3 plus E4)
No-TFN tax offset		
8	901	
National rental affordability scheme tax offset	IAX PAYABLE 15	3 less E - cannot be less tha
6		
Exploration credit tax offset	Section 102AAM G	8
S		
Credit for interest on early payments - amount of interest	Eligible credits H §	S Circ Us street E street E street E
8	cond 111)	(11) block the principle of the principl
Credit for tax withheld - foreign resident withholding	Tax offset refunds	0.00
8	(Remainder of refundable tax offsets)	mount from label E - an a
Credit for tax withheld - where ABN or TFN not quoted (non-individual)		must be included even if it is zero)
9		
Credit for TFN amounts withheld from payments from closely held trusts	PATO IIIS dalli el la salada IV.	
ま り	Supervisory levy	\$ 259.00
Credit for interest on no-TFN tax offset	Supervisory levy adjustment for	
#6 \$	wound up funds	4
Credit for amounts withheld from foreign resident capital gains withholding	Supervisory levy adjustment for N	59
#8 \$	ing wall	

Section E: Losses If total loss is greater than \$100,000, complete and attach a Losses schedule 2020. AMOUNT DUE OR REFUNDABLE S
A positive amount at S is what you owe, while a negative amount is refundable to you blue. Net capital losses carried V \$ Tax losses carried forward to later income years (T5 plus G less H less I less K plus L less M plus N) 830.DQ 259.00 PAGE 5 œ.

Sensitive (when completed)

14 Losses

		fund		
	10	use persona	members or	- 1

SMSF annual return 2020 for Kelly Fife Superannuation Fund

Section H: Assets and liabilities	>	242474
5a Australian managed investments	Insurance policy C S	DØ:
	o	
5b Australian direct investments	Cash and term deposits E \$	6008.00
1	Debt securities F \$.00
Limited recourse borrowing arrangements Australian resident real property	Loans G S	
J1 \$		%
alian non-residential real prope		X
J2 \$	Unlisted snares 🗗	, S. R.
3 §	Limited recourse	**
alian shares	14.1	
J4 S	Non-residential real property K \$	
J5 S .DQ	Residential real property L \$.56
	collectables and M S	. <u>×</u>
J6 \$	Other assets O \$. DQ .
J7 <u>§</u>	18	
15c Other investments	Crypto-Currency: N §	
15d Overseas direct investments	Overseas shares P \$	X
Overs	Overseas non-residential real property Q \$.00
0	Overseas residential real property R \$.)
	Overseas managed investments S §	.000.
	Other overseas assets T \$	D0
TOTAL AUSTRALIAN AND OVERSEAS (Sum of labels A to T)	ND OVERSEAS ASSETS U \$	219482.00
15e In-house assets Did the fund have a loan to, lease to or investment in, related parties (known as in-house assets) at the end of the income year?	ייה A No ייי Yes ייי איי איי איי איי איי איי איי איי אי	.00
15f Limited recourse borrowing arrangements If the fund had an LRBA were the LRBA borrowings from a licensed financial institution?	nents 3A ed No Yes	
Did the members or related parties of the fund use personal guarantees or other	her No Yes	
rund and policinal gas strate i RE		

Fund's tax file number (TFN) 853 166 900

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Do not complete this section if your fund was in was assessable. If you are entitled to claim any	Section B: Income		
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	_	Exempt current persion income	has been a plied.
DQ.	<	income	ensure the correct tax treatment
6.00	¥ \$	GROSS INCOME (Sum of labels A to U)	^This is a mandatory label. *If an amount is entered at this
Loss		(subject to 45% tax rate) (U1 plus U2 plus U3)	U3 &
.06	= 	Net non-arm's length income	*Net other non-arm's length in
	-	status of fund	Plus :Net non-airit s ierigin uust discussione
.DQ.	 	*Assessable income due to changed tax	
.DQ Code	S \$	*Other income	Calculation of non-arm's length income "Net non-arm's length private company dividends
	1 _	(R1 plus R2 plus R3 less R6)	R6 \$
8	7		company or PST
	8	distributions	(an amount must be included even if it is zero)
Z Code			R3 \$
. .	- 9		678 - <u>s</u>
X	X **	*Franked dividend amount	77.0
V	\$	-Unrranked divide in	Plus Assessable personal contributions
8 S	- 	from partnerships	Assessable employer contributions
loss loss			Calculation of assessable contributions
.28	TI		
.DQ Number	₽	Australian franking credits from a New Zealand company	Australian franking credit
.DA. Loss	8	Net foreign income D	Gross foreign income D1 \$.00
.36	\$	Forestry managed investment scheme income	
6.00	8	Gross interest C	
.00	9	Gross rent and other leasing and hiring income B	Gross rent and
	\$	Net capital gain 🛕	
		Yes	Have you applied an M No exemption or rollover? M No
If the total capital loss or total capital gain is greater than \$10,000 complete and attach a Capital gains tax (CGT) schedule 2020.	oss or total capital g ch a Capital gains ta	Yes 🔲	Income Did you have a capital gains tax G No X CCT, event during the year?

PAGE 3

Section C: Deductions and non-deductible expenses

Under 'Deductions' list all expenses and allowances you are entitled to claim a deduction for lunder 'Non-deductible expenses', list all other expenses or normally allowable deductions that you cannot claim as a deduction (for example; all expenses related to exempt current pension you cannot relaim as a deduction (for example; all expenses column) income should be recorded in the 'Non-deductible expenses' column)	eductions and non-deductions expenses
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A2 \$	(N. pius 1)	9	ole income <i>less</i> ctions)	(Total assessable income less total deductions)	i i
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A1 \$	DEDUCTIBLE EXP.	TOTAL NON-	TIONS	TOTAL DEDUC	1
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A1 5	.00	B2 \$	Ø	€	Interest expenses overseas B1
		A2 \$. <u>%</u>	\$	

Section D: Income tax calculation statement

Important:
*Section B label R3, Section C label O and Section D labels A.T1, J, T5 and I are mandatory.

13 Calculation statement

(L suld LL)	
Gross tax B \$ 0.00	
(an amount must be included even if it is zero)	quo
Tax on No-TFN J \$ 0.00	<u>.</u>
(an amount must be included even if it is zero)	
Tax on taxable income T1 \$ 0.00	Tax on t
(an amount must be included even if it is zero)	
Taxable income A \$ 0.00	

Sensitive (when completed)

<u>≤</u> ****2 ≲ Permissible temporary borrowings Borrowings for limited recourse borrowing arrangements Other borrowings 8 8 B Borrowings < 4 Z

Total member closing account balances (total of all CLOSING ACCOUNT BALANCEs from Sections F and G) Reserve accounts X

٤ 214126.00

B

Other liabilities Y 5356.DQ

TOTAL LIABILITIES 7 4

219482.00

Section I: Taxation of financial arrangements

17 Taxation of financial arrangements (TOFA)

Total TOFA gains I

Total TOFA losses 45

B B

Section J: Other information

Family trust election status

If the trust or fund has made, or is making, a family trust election, write the four-digit income year.

specified of the election (for example, for the 2019-20 income year, write 2020). ⊳

If revoking or varying a family trust election, print **R** for revoke or print **V** for variation, and complete and attach the Family trust election, revocation or variation 2020. W

Interposed entity election status

If the trust or fund has an existing election, write the earliest income year specified. If the trust or fund is making one or more elections this year, write the earliest income year being specified and complete an *Interposed entity election or revocation 2020* for each election. ဂ

f revoking an interposed entity election, print **R**, and complete and attach the *Interposed entity election or revocation 2020*. o

PAGE 7

SMSF annual return 2020 for Kelly Fife Superannuation Fund

Section K: Declarations

Penalties may be imposed for false or misleading information in addition to penalties relating to any tax shortfalls

Important
Before making this declaration check to ensure that all income has been disclosed and the annual return; all attached schedules Before making this declaration check to ensure that all income has been disclosed and the annual return, and any additional documents are true and correct in every detail. If you are in doubt about any aspect of the annual return, place all the facts before the ATC.

Privacy
The ATO is authorised by the Taxation Administration Act 1953 to request the provision of tax file numbers (TFNs). We will use the TFN to The ATO is authorised by the Taxation Administration Act 1953 to request the provision of tax file numbers (TFNs, the processing of this identify the entity in our records, it is not an offence not to provide the TFN. However if you do not provide the TFN, the processing of this form may be delayed.

To the ATO to collect information and disclose it to other government agencies. For information about your privacy go to ato gov.au/privacy

I declare that, the current trustees and directors have authorised this annual return and it is documented as such in the SMSF's records I have received a copy of the audit report and are aware of any matters raised therein. The information on this annual return, including any attached schedules and additional documentation is true and correct. TRUSTEE'S OR DIRECTOR'S DECLARATION:

Preferred trustee or director contact details: Family name Title: Mrs First given name Kelly Authorised truste ABN of non-individual trustee Email address Phone number jo.mary.kelly@gmail.com lon-individual trustee name (if applicable) Josephine The Commissioner of Taxation, as Registrar of the Australian Business Register, may use the ABN and business details which you provide on this annual return to maintain the integrity of the register. For further information, refer to the instructions. 03 63 or public officer's signature Mary Suffix Other given names Time taken to prepare and complete this annual return

TAX AGENT'S DECLARATION:

I declare that the Self-managed superannuation fund annual return 2020 has been prepared in accordance with information provided by the frusteeps. That the trustees have given me a declaration stating that the information provided to me is true and correct, and that the insteady have authorised me to lodge this annual return.

11	John Tax agent's practice	Hamilton First given name	Family name	Tax agent's contact details:		Tax agent's signature
Hamilton Accounting Services Tax agent's phone number				ct details:	The second second	
Reference number	William	Other given names	Suffix			18
nber		n names			Date Day	٧
57 Ta					Month Year	
Tax agent nun 57669007						

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Section F: Member information	
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Retirement phase account balance - Noil Cook \$2 \$ 0.00	S1 \$ 156242.77	Inward rollovers and transfers	rollovers and transfers
	etirement phase account balance - Non 0.00	8	
	Retirement phase account balance - CDB	Lump Sum payment	
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0.00		Outstanding limited recourse borrowing arrangement an	ount

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Section F: Member information	1	TOP Kelly File Superanilluation i und	CITIC Company attents
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MEMBER NUMBER 2

Family name Title: Ms

Kelly

673 175 729

Member's TFN See the Privacy note in the Declaration

Josephine First given name

Other given names
Mary

Contributions

OPENING ACCOUNT BALANCE \$

58107.57

Proceeds from primary residence disposal H §

Receipt date H1

Day Month

Year

Day Month Y 24/02/1963 Date of birth

Year

If deceased, date of death

.W: webby family super fund 2019- waiting on your commen...

Account status

08

Day Month

Year

In Section F report all current members in the fund at 30 June.
Use Section G to report any former members or deceased members who held an interest in the fund at any time during the income year. SMSF annual return 2020 TFN 853 166 900 KN: 1000 1047 91814

Sensitive (when completed)

CLOSING ACCOUNT BALANCE S

57883.24

X2

0.00 0.00

Retirement phase value

×1 *

Accumulation phase value

Outstanding limited recourse borrowing arrangement amount

0.00

R2

Income stream payment

Retirement phase account balance - Non CDBIS \$2 \$ 0.00 Retirement phase account halance - CUBIS

S3 \$

0.00

₽1

Lump Sum payment

ъ 69

TRIS Count

Accumulation phase account balance

57883.24

O \$

Allocated earnings or losses

-224.33

Outward rollovers and transfers

Q \$ Code

TOTAL CONTRIBUTIONS N \$

Inward rollovers and transfers

Any other contributions (including Super Co-contributions and Low Income Super Contributions)

3 **⊣** Non-assessable foreign superannuation fund amount Assessable foreign superannuation fund amount

49

Transfer from reserve: assessable amount

Transfer from reserve: non-assessable amount

Contributions from non-complying funds and previously non-complying funds

CGT small business 15-year exemption amount

٥

Spouse and child contributions Other third party contributions **G**

Personal injury election

CGT small business retirement exemption C

ABN of principal employer A1

Personal contributions B

Employer contributions A

Part A Electronic lodgmeric declaration (Form P, T, C, F, SMSF or EX)
This declaration is to be completed where the tax return is to be lodged via the Tax Office's electronically.
It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

TTHE ATO is authorised by the Taxation Administration Act 1953 to request the provision of tax file numbers (TFNs). The ATO will use the TFNs to identify each partner or beneficiary or entity in our records. It is not an offence not to provide the TFNs. However, lodgments cannot be accepted electrorically if the the TFN is not quoted.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies, including personal information about the person authorised to sign the declaration. For information about privacy go to ato.gov.au/privacy.

Electronic funds transfer - direct debit
Where you have requested an EFT direct debit some of your details will be provided to your financial institution and the Tax Office's sponsor bank to facilitate the payment of your taxation liability from your nominated account.

Tax File Number	853 166 900 Year [2020]	
Name of Partnership. Trust, Fund or Entity	Kelly Fife Superannuation Fund	Ш
Total Income or Loss	6 Deductions 836 Taxable Income -830	<u> </u>
authorise my tax agent t aportant efore making this declar	authorise my tax agent to electronically transmit this tax return via an approved ATO electronic channel. **sportant** **sport	
etail. If you are in doubt at an atties for false or mislea eclaration: I declare that all of the information I ha	stall. If you are in doubt about any aspect of the tax return, place all the facts before the Tax Office. The tax law provides heavy snallies for false or misleading statements on tax returns ecclaration: I declare that. All of the information I have provided to the agent for the preparation of this document is true and correct.	
All of the injornation to	All of the injuditiation is lake provinces to the agent for the propagation of the accommon to the Commissioner of Taxation. I authorise the agent to give this document to the Commissioner of Taxation.	
Signature of Partner, Trustee or Director	Date	
art B	ELECTRONIC FUNDS TRANSFER CONSENT	
nis declaration is to be or rough an approved ATC nis declaration must be you elect for an EFT, al	is declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged rough an approved ATO electronic channel. It is declaration must be signed by the partner, trustee, director or public officer prior to the EFT details being transmitted to the Tax Office you elect for an EFT, all details below must be completed.	8
EET Account 017 049	017 042 - 205 742 972 Kelly Fife Super Fund]
authorise the refund to t	directly to the specified account.	
Agent's reference number	57669007 Signature Date	Ш
and D	Tax agent's certificate (shared facility users only)	
declare that: I have prepared this tax return I have received a declaration in I have received by the partner;	lectare that lectare that accordance with the information supplied by the partner, trustee, director or public officer I have prepared this tax return in accordance with the information provided to me for the preparation of this tax return is true and correct I have received a declaration made by the entity that the information provided to me for the preparation of this tax return is true and correct law authorised by the partner, frustee, director public officer to lodge this tax return, including any applicable schedules.	rrect
Agent's signature	Date 12 12 Glient's KELLYFISF	Ш
Contact name	John William Hamilton	
Agent's phone number	03 62251081 Agent's 57669007	
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