



Request to adjust concessional contributions

WHO SHOULD COMPLETE THIS FORM?

Only members of a self-managed superannuation fund (SMSF) can complete this form for contributions they made to their SMSF.

COMPLETING THIS FORM

The instructions contain important information

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.

i The instructions contain important information about completing this form. Refer to them for more information about how to complete and lodge this form.

Section A: Your details

1 Tax file number (TFN)

i You don't have to provide your TFN to us. However, if you do, it will help us identify you correctly and process your form quickly. For more information on privacy, refer to ato.gov.au/privacy

2 Full name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

3 Date of birth / /

4 Current postal address

Street address

Suburb/town/locality

State/territory
(Australia only)

Postcode
(Australia only)

5 Daytime phone number (include area code)

Section B: Self Managed Superannuation Fund Details

The SMSF to which the concessional contributions to be adjusted were made:

6 What is your Australian business number (ABN)?

7 Fund name

Section E: Declaration

Privacy

The ATO is a government agency bound by the Privacy Act 1988 in terms of collection and handling of personal information and TFNs. For further information about privacy law notices go to ato.gov.au/privacy

Complete the declaration that applies to you. Print your full name then sign and date the declaration.

INDIVIDUAL DECLARATION

I declare that the information contained in this form is true and correct.

Name (Print in BLOCK LETTERS)

Signature

Date

Day	Month	Year
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

AGENT OR AUTHORISED OFFICER DECLARATION

complete this declaration if you are an authorised representative of the individual shown in Section A.

I declare that:

- I have prepared the form with the information supplied by the individual
- I have received a declaration made by the individual that the information provided to me for the preparation of this statement is true and correct
- I am authorised by the individual to give the information in this form to the Australian Taxation Office.

Signature

Date

Day	Month	Year
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Tax agent number (if applicable)

Name of organisation (if applicable)

Agent or Authorised Officer name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Agent or Authorised Officer phone number (include area code)

Agent or Authorised Officer address

Street address

Suburb/town/locality

State/territory

(Australia only)

Postcode

(Australia only)

Lodging your form

Post or fax your completed and signed form to:

✉ fax on 1300 139 024

■ mail to

Australian Taxation Office
PO Box 3578
ALBURY NSW 2640

Sensitive (when completed)

28/07/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68		
27/08/2020	JAMES YEATES & S YEATES SUPER RDY 50	2,493.35		
29/09/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68		
22/10/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68		
23/11/2020	JAMES YEATES & S YEATES SUPER 50	2,493.35		
24/12/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68		
8/02/2021	JAMES YEATES & S YEATES SUPER 50	3,914.28		
24/02/2021	JAMES YEATES & S YEATES SUPER 50	2,671.65		
25/03/2021	JAMES YEATES & S YEATES SUPER BOB 50	1,994.68		
27/04/2021	JAMES YEATES & S YEATES SUPER BOB 50	2,529.57		
24/05/2021	JAMES YEATES & S YEATES SUPER BOB 50	573.75		
24/06/2021	JAMES YEATES & S YEATES SUPER 50	3,914.28	1322.1	-3914.28 25,971.45

28/07/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60		
27/08/2020	JAMES YEATES & S YEATES SUPER LY 50	2,399.50		
29/09/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60		
22/10/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60		
23/11/2020	JAMES YEATES & S YEATES SUPER 50	2,399.50		
24/12/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60		
24/02/2021	JAMES YEATES & S YEATES SUPER 50	2,559.03		
25/03/2021	JAMES YEATES & S YEATES SUPER LORRA 50	1,919.60		
27/04/2021	JAMES YEATES & S YEATES SUPER LKY 50	2,398.19		
24/05/2021	JAMES YEATES & S YEATES SUPER LK 50	2,399.50		
24/05/2021	JAMES YEATES & S YEATES SUPER 50	1,919.60	402.38	23,673.32 24,075.70

Accounts - Yeates Media

From: Bob and Lorraine Yeates [bobyates@bigpond.com]
Sent: Friday, 15 October 2021 8:15 PM
To: lorraine@yeatesmedia.com.au
Subject: FW: RD & LK Yeates Super Fund and 2021 Tax

From: Harry Capobianco [mailto:harryc@eager.com.au]
Sent: Friday, October 15, 2021 12:41 PM
To: Bob and Lorraine Yeates
Cc: Robert Yeates
Subject: RD & LK Yeates Super Fund and 2021 Tax

Hi Lorraine & Bob,

We'd like to start processing 2021 tax work for your superannuation fund if that's OK.

We have all the information needed – would only need clarification of who these contributions were for:-

28/07/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60	Lorraine
28/07/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68	Bob
29/09/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60	Lorraine
29/09/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68	Bob
22/10/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60	Lorraine
22/10/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68	Bob
23/11/2020	JAMES YEATES & S YEATES SUPER 50	2,399.50	Lorraine
23/11/2020	JAMES YEATES & S YEATES SUPER 50	2,493.35	Bob
24/12/2020	JAMES YEATES & S YEATES SUPER 50	1,919.60	Lorraine
24/12/2020	JAMES YEATES & S YEATES SUPER 50	1,994.68	Bob
8/02/2021	JAMES YEATES & S YEATES SUPER 50	3,914.28	Bob
24/02/2021	JAMES YEATES & S YEATES SUPER 50	2,559.03	Lorraine
24/02/2021	JAMES YEATES & S YEATES SUPER 50	2,671.65	Bob
24/06/2021	JAMES YEATES & S YEATES SUPER 50	3,914.28	Bob 1994.68 Lorraine 1919.60

Please confirm that these contributions were for Lorraine

27/08/2020	JAMES YEATES & S YEATES SUPER LY 50	2,399.50	Lorraine
25/03/2021	JAMES YEATES & S YEATES SUPER LORRA 50	1,919.60	Lorraine
27/04/2021	JAMES YEATES & S YEATES SUPER LKY 50	2,398.19	Lorraine
24/05/2021	JAMES YEATES & S YEATES SUPER LK 50	2,399.50	Lorraine

Please confirm that these contributions were for Bob

27/08/2020	JAMES YEATES & S YEATES SUPER RDY 50	2,493.35	Bob
25/03/2021	JAMES YEATES & S YEATES SUPER BOB 50	1,994.68	Bob
27/04/2021	JAMES YEATES & S YEATES SUPER BOB 50	2,529.57	Bob
24/05/2021	JAMES YEATES & S YEATES SUPER BOB 50	2,493.35	Bob

Let me know if you have any questions.

Kind Regards,

Harry.
Harry Capobianco B.Bus., CPA



Pre-filling report 2021

Report created: 19/10/2021

① **You should not rely exclusively on this report** but use it to assist you in preparing your client's income tax return. For more information refer to www.ato.gov.au/prefilling.
(<https://www.ato.gov.au/prefilling>)

TAXPAYER DETAILS

Tax file number	328591010
Title	MR
Given names	ROBERT DONALD
Family name and suffix	YEATES
Australian resident as at 19/10/2021	Yes
Postal address	74 MAIN ST BAIRNSDALE VIC 3875
Residential address	35 FRANCIS ST BAIRNSDALE VIC 3875
Date of birth	21/03/1953

2020-21 PAYG PAYMENT SUMMARIES as at 13 July 2021

Type of payment summary:	INB payment summary			
Single Touch Payroll Status:	Finalised			
Available for pre-filling:	13/07/2021			
ABN:	80004145288/1			
Employer's name:	JAMES YEATES AND SONS PROPRIETARY LIMITED (Type S)			
Period from:	01/07/2020			
Period to:	30/06/2021			
Description	Type	Tax withheld	Income	Label
Gross payments			\$88,007.00	1
Total tax withheld		\$20,548.00		1
Reportable fringe benefits			\$9,653.00	IT1W
Is the employer exempt from FBT under section 57A of the FBTA 1986?	No			
Reportable employer superannuation contributions			\$18,408.00	IT2

2020-21 INTEREST INCOME as at 7 July 2021