

# Self-managed superannuation fund annual return

2022

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 2022* (NAT 71287).

- The Self-managed superannuation fund annual return instructions 2022 (NAT 71606) (the instructions) can assist you to complete this annual return.
- The SMSF annual return cannot be used to notify us of a change in fund membership. You must update fund details via ABR.gov.au or complete the Change of details for superannuation entities form (NAT 3036).

To cor	mplete	this an	inual r	eturn
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- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS and print one character per box.

8 M 1 T H 8 T

- Place X in ALL applicable boxes.
- Postal address for annual returns:

Australian Taxation Office GPO Box 9845 [insert the name and postcode of your capital city]

For example;

Australian Taxation Office GPO Box 9845 SYDNEY NSW 2001

Section A: Fund information	
1 Tax file number (TFN) 504 559 136	To assist processing, write the fund's TFN at the top of pages 3, 5, 7, 9 and 11.
The ATO is authorised by law to request your TFN. You are not obliged the chance of delay or error in processing your annual return. See the l	I to quote your TFN but not quoting it could increase Privacy note in the Declaration.
2 Name of self-managed superannuation fund (SMSF)	
R + L SUZIE SUPER FUND	
3 Australian business number (ABN) (if applicable)	6 086 819
4 Current postal address	
POBOX 806	
Suburb/town  OXENFORD	State/territory Postcode  QLD 4210

5 Annua	I re	turn	status
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Is this an amendment to the SMSF's 2022 return?

A No X Yes

Is this the first required return for a newly registered SMSF?

B No X Yes



6 SMSF auditor
Auditor's name
Title: Mr X Mrs Miss Ms Other Family name
BOUS
First given names Other given names
ANTHONY SMSF Auditor Number Auditor's phone number
100014140 0410712708
Postal address
BOX 3316 CONTRACTOR OF THE STATE OF THE STAT
Suburb/town State/territory Postcode
RUNDLE MALL SA 5000
Date audit was completed A
Was Part A of the audit report qualified?  B No Yes
Was Part B of the audit report qualified? C No Yes
If Part B of the audit report was qualified, have the reported issues been rectified?  D No Yes
7 Electronic funds transfer (EFT) We need your self-managed super fund's financial institution details to pay any super payments and tax refunds owing to you.
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 182512 Fund account number 966 368 987
RILSUZIESMSF PTU LTD ATF RALL
SUZIESUPERFUND
I would like my tax refunds made to this account. Go to C.
B Financial institution account details for tax refunds
This account is used for tax refunds. You can provide a tax agent account here.  BSB number Account number Account number
Account name
C Electronic service address alias
Provide the electronic service address alias (ESA) issued by your SMSF messaging provider.  (For example, SMSFdataESAAlias). See instructions for more information.
BGLSF360

	Fund's tax file number (TFN) 504 559 136
8	Status of SMSF Australian superannuation fund A No Yes X Fund benefit structure B A Code
	Does the fund trust deed allow acceptance of the Government's Super Co-contribution and Low Income Super Amounts?
9	Was the fund wound up during the income year?
	No Yes X If yes, provide the date on which the fund was wound up 0 / 0 / 0 / 2 / 2 / 2 / 2 / 3 / No Yes X
10	Exempt current pension income
	Did the fund pay retirement phase superannuation income stream benefits 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.
	No Go to Section B: Income.
	Yes Exempt current pension income amount A\$
	Which method did you use to calculate your exempt current pension income?
	Segregated assets method B
	Unsegregated assets method C Was an actuarial certificate obtained? D Yes
	Did the fund have any other income that was assessable?
	E Yes Go to Section B: Income.
	No Choosing 'No' means that you do not have any assessable income, including no-TFN quoted contributions.  Go to Section C: Deductions and non-deductible expenses. (Do <b>not</b> complete Section B: Income.)
	lf you are entitled to claim any tax offsets, you can list these at Section D: Income tax calculation statement.



				Date of the last			
Section B: Inc	ome				i en		
Do not complete this sec the retirement phase for th notional gain. If you are en	e <b>entire year</b> , there wa	as <b>no</b> other incon	ne that	was assess	sable, and vo	u have not rea	ised a deferrer
11 Income  Did you have a cap  (CGT) event due	pital gains tax		If the t \$10,0 2017	total capital I 00 or you ele and the defe	loss or total o ected to use erred notional	capital gain is gr the transitional gain has been gains tax (CGT)	eater than CGT relief in realised.
Have yo exemption	ou applied an n or rollover?	Yes Yes	Code				
		Net capital gain	A \$		49,	705-98	
Gross re	ent and other leasing a	and hiring income	B \$		, 6,	357.00	
		Gross interest	<b>C</b> \$		, 2,	487-00	
	Forestry man	aged investment scheme income	<b>X</b> \$		,,	-5×	
Gross foreign in		et foreign income	<b>D</b> \$		, ,	-5%	Loss
Australian franking	credits from a New Z	ealand company	E\$			-58	
		Transfers from foreign funds	F \$			.00	Number
		payments where ABN not quoted	H\$			-50	
Calculation of assessable Assessable employer of	contributions	Gross distribution om partnerships	1\$			->0	Loss
R1 \$ , 70	, 1 1 8 - DE *Un	franked dividend	J\$			-Se	
plus Assessable personal c		amount Franked dividend	K\$			-54	
plus #*No-TFN-quoted co		amount Dividend franking	1 6				
R3 \$ amount must be included	ed even if it is zero)	credit *Gross trust	L 5				Code
less Transfer of liability to life	insurance	distributions	M \$	,		- 50	
R6 \$ ,	, 0-><	Assessable contributions (R1 plus R2 plus R3 less R6)	R \$			118-90	
*Net non-arm's length private or  plus *Net non-arm's length tru  U2 \$	ompany dividends  *Ass	*Other income sessable income to changed tax status of fund	s \$ T \$			-5%	Code
plus *Net other non-arm's le	ngth income (subje	Net non-arm's length income ect to 45% tax rate) 1 plus <b>U2</b> plus <b>U3</b> )	<b>U</b> \$			-5%	
*This is a mandatory label.		ROSS INCOME of labels <b>A</b> to <b>U</b> )	<b>w</b> \$		77,	667.	Loss
*If an amount is entered at this label.	Exempt current	pension income	Y \$			-84	

check the instructions

to ensure the correct

tax treatment has been applied.

TOTAL ASSESSABLE INCOME (W less Y)

Loss

□,□71,661-%

## Section C: Deductions and non-deductible expenses

#### 12 Deductions and non-deductible expenses

Under 'Deductions' list all expenses and allowances you are entitled to claim a deduction for. Under 'Non-deductible expenses', list all other expenses or normally allowable deductions that you cannot claim as a deduction (for example,

all expenses rela	ated to exempt current pension income should be red	corded in the 'Non-deductible expenses' column).								
	DEDUCTIONS	NON-DEDUCTIBLE EXPENSES								
Interest expenses within Australia	A1\$ , , , 838 · 50	A2 \$,								
Interest expenses overseas	B1 \$,	B2 \$,								
Capital works expenditure	D1 \$,	D2 \$								
Decline in value of depreciating assets	E1\$ , 396->	E2 \$,								
Insurance premiums – members	F1 \$	F2 \$,								
SMSF auditor fee	H1\$ , 660-50	H2 \$,								
Investment expenses	11\$ 10,278-2	12 \$,,								
Management and administration expenses	J1\$	J2\$,,500-%								
Forestry managed investment scheme expense	U1 \$,	U2 \$,								
Other amounts	L1 \$	L2\$,,								
Tax losses deducted	M1 \$,,∞<									
	TOTAL DEDUCTIONS	TOTAL NON-DEDUCTIBLE EXPENSES								
	N\$ 19.063 № Y\$ 11.63 X №									
	(Total A1 to M1) (Total A2 to L2)									
	#TAVADLE (NOOME OD LOOG									
	*TAXABLE INCOME OR LOSS	TOTAL SMSF EXPENSES								
This is a mandatory	<b>0</b> \$,_58,604.∞	z\$,,								
THIS IS A HAHUATURY	(TOTAL ASSESSARI F INCOME less	(N phio V)								

label.

TOTAL DEDUCTIONS





### Section D: Income tax calculation statement

#### #Important:

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Section B label R3, Section C label O and Section D labels A,T1, J, T5 and I are mandatory. If you leave these labels blank, you will have specified a zero amount.

12 Coloulation statement	o amount.	
13 Calculation statement	#Taxable incom	• <b>A</b> \$ ,
Please refer to the Self-managed superannuation		(an amount must be included even if it is zero)
fund annual return instructions	#Tax on taxable income	e T1 \$,, 8,790.69
2022 on how to complete the calculation statement.	#Tax o	(an amount must be included even if it is zero)
odiodiadori otatornoria	no-TFN-quoted	J\$
	contribution	(an amount must be included even if it is zero)
	Gross tax	× B\$ 190.69
		(T1 plus J)
Foreign income tax offset	ton-1 savious 1	
C1\$	-	
Rebates and tax offsets		Non-refundable non-carry forward tax offsets
C2\$,,_		c \$ , , , ,
		(C1 plus C2)
		SUBTOTAL 1
		T2 \$
Early stage venture capital	limited	(B less C – cannot be less than zero)
partnership tax offset		
D1\$,		
Early stage venture capital tax offset carried forward fr	limited partnership	Non refundable come forward to a start-
D2\$	I pievious year	Non-refundable carry forward tax offsets  D \$
Early stage investor tax offs	set	(D1 plus D2 plus D3 plus D4)
D3\$		
Early stage investor tax offs	set	
carried forward from previo	us year	SUBTOTAL 2
		T3 \$
		(T2 less D – cannot be less than zero)
Complying fund's franking of	redits tax offset	
E1\$,,		
No-TFN tax offset		
الله والمسالسة والسالسات	domo tou effect	
National rental affordability so	cheme tax offset	
Exploration credit tax offset		Refundable tax offsets
E4\$		E\$ DO DO DO DO DO
		(E1 plus E2 plus E3 plus E4)
	*TAX PAYABLE	
		(T3 less E – cannot be less than zero)
		Section 102AAM interest charge  G \$

Fund's tax file number (TFN) 504 559 136

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H1\$	mount	of int	eres	t 1					7	1																					_		
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	redit for																														2260922		
Н3\$								•																							22		-
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H5\$	ayrrieri			Sely	Tiel		ISIS 																										
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H6\$		],[																															
C	redit fo	r fore	ign r	esid	ent d	capit	tal g	ain	3		F	liai	ble	cre	dits																		
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**OFFICIAL: Sensitive** (when completed)

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Section F: Member information
MEMBER 1
Title: Mr Mrs Miss Ms Other Family name
First given names Other given names
Member's TFN See the Privacy note in the Declaration.  Date of birth  Day  Month  Year  Year
Contributions  OPENING ACCOUNT BALANCE \$,
Proceeds from primary residence disposal  H \$ Proceeds from primary residence disposal
Employer contributions  A \$ Day Month Year  H1 Receipt date
ABN of principal employer  Assessable foreign superannuation fund amount
A1
Personal contributions  Non-assessable foreign superannuation fund amount
B\$,
CGT small business retirement exemption  Transfer from reserve: assessable amount
C\$ K\$ , I , I , I . K\$ , I , I , I . I . I . I . I . I . I . I
CGT small business 15-year exemption amount  Transfer from reserve: non-assessable amount  L \$
Personal injury election  Contributions from non-complying funds
E \$ and previously non-complying funds
Spouse and child contributions T\$,,
F \$ Any other contributions (including Super Co-contributions
Other third party contributions and Low Income Super Amounts)
G \$ , , ,
TOTAL CONTRIBUTIONS N \$,, (Sum of labels A to M)
Allocated parnings or league
Other transactions  O \$
Inward rolloyers and transfers
Accumulation phase account balance  S1 \$
Outward rollovers and transfers
Retirement phase account balance  - Non CDBIS  Q \$,
S2 \$ Lump Sum payments Code
Retirement phase account balance
- CDBIS Income stream payments Code
\$3 \$
TRIS Count CLOSING ACCOUNT BALANCE \$ \$
(\$1 plus \$2 plus \$3)
Accumulation phase value X1 \$
Retirement phase value X2 \$,
Outstanding limited recourse borrowing arrangement amount

Fund's tax file number (TFN) 504 559 136
MEMBER 2
Title: Mr Mrs Miss Ms Other
Family name
First given name Other given names
Member's TFN See the Privacy note in the Declaration.  Date of birth  Date of birth  Date of birth
Contributions  OPENING ACCOUNT BALANCE \$,
Refer to instructions for completing these labels.  Proceeds from primary residence disposal  Output  Description:
Employer contributions  H \$ Day Month Year
A \$, H1 Receipt date//
ABN of principal employer  Assessable foreign superannuation fund amount
Personal contributions
Non-assessable foreign superannuation fund amount  J \$
CGT small business retirement exemption  Transfer from reserve: assessable amount
C\$ K\$ , I , I , I , I K\$ , I , I , I , I , I , I , I , I , I ,
CGT small business 15-year exemption amount  Transfer from reserve: non-assessable amount  L \$
Personal injury election Contributions from non-complying funds
and previously non-complying funds
Spouse and child contributions  T \$,,
Other third party contributions and Low Income Super Amounts)
G \$, M \$,
TOTAL CONTRIBUTIONS N \$
(Sum of labels A to M)
Allocated earnings or losses  Other transactions
Accumulation phase account balance  P \$   Inward rollovers and transfers
S1 \$ Outward rollovers and transfers
Retirement phase account balance  - Non CDBIS  Q \$
S2 \$ Lump Sum payments Code
Retirement phase account balance
- CDBIS Income stream payments Code
S3 \$
TRIS Count CLOSING ACCOUNT BALANCE \$ \$
(\$1 plus \$2 plus \$3)
Accumulation phase value X1 \$
Retirement phase value X2 \$
Outstanding limited recourse borrowing arrangement amount  Y \$

MEMBER 3	
Title: Mr Mrs Miss Ms Other	
Family name	
First given name Other given	names
Member's TFN	Day Month Year
See the Privacy note in the Declaration.	Date of birth / / / /
Contributions OPENING ACCOUNT BALANCE \$	],,,,
Pofor to inchuse for any letter of the control of	Proceeds from primary residence disposal
Refer to instructions for completing these labels.	
Employer contributions  A \$	Day Month Year
	Receipt date//
ABN of principal employer	Assessable foreign superannuation fund amount
Personal contributions	
B\$	Non-assessable foreign superannuation fund amount
CGT small business retirement exemption	Transfer from reserve: assessable amount
C\$	
CGT small business 15-year exemption amount	Transfer from reserve: non-assessable amount
D\$	
Personal injury election	Contributions from non-complying funds
E\$_ ,	and previously non-complying funds
Spouse and child contributions	*
F \$	Any other contributions (including Super Co-contributions
Other third party contributions  G \$  \text{	and Low Income Super Amounts)
G \$,, M S	P , ,
TOTAL CONTRIBUTIONS N S	
	(Sum of labels A to M)
	Allocated earnings or losses Loss
Other transactions o s	
Accumulation phase account balance	Inward rollovers and transfers
S1 \$ PS	
Potiroment phage appount belongs	Outward rollovers and transfers
- Non CDBIS	·
S2 \$	Lump Sum payments Code
Retirement phase account balance	۶ ــــــــــــــــــــــــــــــــــــ
- CDBIS	Income stream payments Code
S3 \$ , R2 \$	
TRIS Count CLOSING ACCOUNT BALANCE S \$	
TRIS Count CLOSING ACCOUNT BALANCE \$ \$	(S1 plus S2 plus S3)
Accumulation phase value X1 \$	<b>5</b> ,,
Retirement phase value X2 \$	
Outstanding limited recourse	
borrowing arrangement amount	المراجع

rund's tax me	number (IFN) DOH DON IDG
MEMBER 4	
Title: Mr Mrs Miss Ms Other	
Family name	
First given name Other given	names
Member's TFN	Day Month Year
See the Privacy note in the Declaration.	Date of birth / / / / /
Contributions OPENING ACCOUNT BALANCE \$	],,,,
Refer to instructions for completing these labels.	Proceeds from primary residence disposal
Harris and the second s	\$,,
Employer contributions  A \$ H	Day Month Year
ABN of principal employer	1 Receipt date / / / / / / / / / / / / / / / / / / /
A1	Assessable foreign superannuation fund amount
Personal contributions	Non-assessable foreign superannuation fund amount
B\$,	
CGT small business retirement exemption	Transfer from reserve: assessable amount
C\$K	\$ <u></u>
CGT small business 15-year exemption amount  D \$	Transfer from reserve: non-assessable amount
Personal injury election	
E\$	Contributions from non-complying funds and previously non-complying funds
Spouse and child contributions	and previously non-complying funds
F\$,	Any other contributions (including Super Co-contributions
Other third party contributions	and Low Income Super Amounts)
G \$ M :	\$,,
TOTAL CONTRIBUTIONS N	
	(Sum of labels A to M)
Olle and the second of the sec	Allocated earnings or losses Loss
Other transactions	
Accumulation phase account balance	Inward rollovers and transfers
S1 \$ P S	
Retirement phase account balance	Outward rollovers and transfers
-Norrobbio	
S2 \$, R1 S	
Retirement phase account balance  - CDBIS	Income atrees we went
S3 \$ R2 S	Income stream payments Code
TRIS Count CLOSING ACCOUNT BALANCE \$ 5	
	(S1 plus S2 plus S3)
Accumulation phase value X1	
Retirement phase value X2 \$	
Outstanding limited upon upo	
borrowing arrangement amount	

Title: w   Mes   Mes   Mes   Other    Title: w   Mes   Mes   Mes   Other    Thirty name    Member's TFN    See the Privacy note in the Declaration    Date of birth   /      Member's TFN    Member's TFN    Date of birth   /      Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Member's TFN    Accountable in the Declaration    Date of birth   /        Accountable in the Declaration    Date of birth   /        Accountable in the Declaration    Accountable in the Declaration    Date of birth   /        Accountable in the Declaration    Accountable in the Declarati		
Title: Mr. Mes Ms. Ms. Cherr Finth name  Other phen name	MEMBER 5	
First given name  Other given name  Is given	Title: Mr Mrs Miss Ms Other	
Member's TFN See the Privacy note in the Declaration.  Date of birth   Org.   Werb   Werb    Date of birth   Org.   Werb   Werb    Date of birth   Org.   Werb    Date of birth   Org.   Werb    Date of birth   Org.   Org.    Percent instructions for completing these labels.  Employer contributions  A S   Org.   Org.    ASSISTED   Org.   Org.    ASSISTED   Org.   Org.    ASSISTED   Org.   Org.    Personal contributions  B S   Org.   Org.    Personal briuty decilon   Org.    Personal triuty decilon   Org.    Assessable foreign superanuation fund amount    L S   Org.   Org.    Non-assessable amount    K S   Org.   Org.    Non-assessable amoun		
Member's TFN See the Privacy note in the Declaration.  Date of birth  Proceeds from primary residence deposal  H\$  Recept date  Date of birth  Proceeds from primary residence deposal  H\$  Recept date  Date of birth  Proceeds from primary residence deposal  H\$  Recept date  Date of birth  Proceeds from primary residence deposal  H\$  Recept date  Date of birth  Non-assessable oreign superanusation fund amount  Date of birth  Non-assessable foreign superanusation fund amount  Date of birth  Non-assessable foreign superanusation fund amount  Date of birth  Non-assessable foreign superanusation fund amount  L\$  Sassessable foreign superanusation fund amount  L\$  Sass		
Date of birth	First given name Other given	names
Date of birth		
Contributions  OPENING ACCOUNT BALANCE \$ , , , , , , , , , , , , , , , , , ,	Member's TFN	
Refer to instructions for completing these labels.  Employer contributions  A S		Date of birth / / / /
Refer to instructions for completing these labels.  Employer contributions  A S		
Employer contributions  A \$	Contributions OPENING ACCOUNT BALANCE \$	
Employer contributions  A \$		
Employer contributions  A \$	Refer to instructions for completing these labels.	
A\$\ABN of principal employer A1		
ARN of principal employer  A1	A \$   H	
Personal contributions  B\$		
CGT small business retirement exemption CGT small business retirement exemption CGT small business 15-year exemption amount D\$	A1 I	
CGT small business retirement exemption Contributions Transfer from reserve: assessable amount  K \$	Personal contributions	Non-assessable foreign superannuation fund amount
C \$,,	B\$	
C\$ \$	CGT small business retirement exemption	Transfer from reserve: assessable amount
CGT small business 15-year exemption amount  D\$	C\$ K	
Personal njury election  E \$		
Personal injury election  Contributions from non-complying funds and previously non-co	D\$	
and previously non-complying funds  Spouse and child contributions  F\$		
Any other contributions (including Super Co-contributions and Low Income Super Amounts)  M \$		and previously non-complying funds
Other third party contributions  G \$	Spouse and child contributions	\$,,
Other transactions  Other transactions  Other transactions  Osses  Accumulation phase account balance - Non CDBIS  S2 \$	F\$	
TOTAL CONTRIBUTIONS N \$,,,,,		and Low Income Super Amounts)
Code  Retirement phase account balance - CDBIS - CDBIS - CLOSING ACCOUNT BALANCE - COde - Retirement phase account balance - CDSING ACCOUNT BALANCE - COde - Retirement phase value - CLOSING ACCOUNT BALANCE - COde - Retirement phase value - CLOSING ACCOUNT BALANCE - CDBIS - CLOSING ACCOUNT BALANCE - CDBIS - CLOSING ACCOUNT BALANCE - CLOSING ACCOUNT BALANC	G \$ , M S	
Code  Retirement phase account balance - CDBIS - CDBIS - CLOSING ACCOUNT BALANCE - COde - Retirement phase account balance - CDSING ACCOUNT BALANCE - COde - Retirement phase value - CLOSING ACCOUNT BALANCE - COde - Retirement phase value - CLOSING ACCOUNT BALANCE - CDBIS - CLOSING ACCOUNT BALANCE - CDBIS - CLOSING ACCOUNT BALANCE - CLOSING ACCOUNT BALANC		
Allocated earnings or losses  Accumulation phase account balance  S1 \$	TOTAL CONTRIBUTIONS N	
Accumulation phase account balance  S1 \$		
Accumulation phase account balance  S1 \$	Other transactions	
Accumulation phase account balance  S1 \$	O (	<sup>5</sup> ,
Retirement phase account balance - Non CDBIS  S2 \$	Accumulation phase account balance	
Retirement phase account balance - Non CDBIS  S2 \$	S1 \$ PS	5 , ,
- Non CDBIS S2 \$,	Retirement phase account balance	
R1 \$ , , , , , ,		\$,
Retirement phase account balance  - CDBIS  S3 \$ Income stream payments  R2 \$ Income stream payments  Code  R2 \$ Income stream payments  (S1 plus \$2 plus \$3)  Accumulation phase value X1 \$ Income stream payments  Retirement phase value X1 \$ Income stream payments  Code  R2 \$ Income stream payments  Code  R2 \$ Income stream payments  (S1 plus \$2 plus \$3)  Accumulation phase value X2 \$ Income stream payments  Code  R2 \$ Income stream payments  Code  R2 \$ Income stream payments  (S1 plus \$2 plus \$3)		
S3 \$ Income stream payments  R2 \$ Income stream payments  Code  R2 \$ Income stream payments  Code  R2 \$ Income stream payments  Code  R3 \$ Income stream payments  Code  R4 \$ Income stream payments  Code  R5 plus \$2 plus \$3)  Accumulation phase value X1 \$ Income stream payments  Code  R5 plus \$2 plus \$3  Outstanding limited recourse  Code  Code  R2 \$ Income stream payments  Code  Co	Retirement phase account balance	<b>5</b> ,
TRIS Count  CLOSING ACCOUNT BALANCE  S\$  (S1 plus S2 plus S3)  Accumulation phase value X1 \$  Retirement phase value X2 \$  Outstanding limited recourse		Income stream payments Code
Accumulation phase value X1 \$ , , , , , , , , , , , , , , , , , ,	S3 \$ R2 9	
Accumulation phase value X1 \$ , , , , , , , , , , , , , , , , , ,		
Accumulation phase value X1 \$	TRIS Count CLOSING ACCOUNT BALANCE S	
Retirement phase value X2 \$		(S1 plus S2 plus S3)
Retirement phase value X2 \$	Accumulation phase value V1	
Outstanding limited recourse velocities of the course velocities of the		
Outstanding limited recourse ve	Retirement phase value X2 \$	
horrowing arrangement amount	Outstanding limited recourse borrowing arrangement amount	

MEMBER 6		
Title: Mr Mrs Miss Ms Other Ms		
Family name		
First given name  Other given names		
Member's TFN See the Privacy note in the Declaration.  Date of birth  Day / Month / Year  Day / Month / Year		
Contributions OPENING ACCOUNT BALANCE \$,		
Refer to instructions for completing these labels.  Proceeds from primary residence disposal  H \$		
Employer contributions  Day Month Year		
A\$ H1 Receipt date / / / / / ABN of this indicate in the second of the s		
ABN of principal employer  Assessable foreign superannuation fund amount  IS		
Personal contributions  Non-assessable foreign superannuation fund amount		
B\$,,,		
CGT small business retirement exemption  Transfer from reserve: assessable amount		
CGT small business 15-year exemption amount  Transfer from reserve: non-assessable amount		
D\$ L\$ Indicate the contract of		
Personal injury election  Contributions from non-complying funds and previously non-complying funds		
Spouse and child contributions  T \$		
F \$ Any other contributions (including Super Co-contributions		
Other third party contributions and Low Income Super Amounts)		
G \$ , , ,		
TOTAL CONTRIBUTIONS N \$		
(Sum of labels A to M)		
Other transactions  Allocated earnings or losses  O \$		
Inverse relieuers and transfers		
Accumulation phase account balance  S1 \$ P \$		
Outward rollovers and transfers		
- Non CDBIS		
R1 \$		
Retirement phase account balance  - CDBIS  Income stream payments  Code		
S3 \$ ,		
TRIS Count CLOSING ACCOUNT BALANCE \$ \$,,,		
Accumulation phase value X1 \$		
Retirement phase value X2 \$,		
Outstanding limited recourse borrowing arrangement amount		

Section G: Supplementary member information  MEMBER 7
Title: Mr X Mrs Miss Ms Other Account status  Account status
RODNEY Cother given names  EDWARD
Member's TFN See the Privacy note in the Declaration.  Date of birth Day Month Year  Day Month D
121 509 912 19/08/1960
Contributions  OPENING ACCOUNT BALANCE \$ , , , , , , , , , , , , , , , , , ,
Proceeds from primary residence disposal  H \$ Proceeds from primary residence disposal
Employer contributions  A \$
A1 I\$,,
B\$ Non-assessable foreign superannuation fund amount
CGT small business retirement exemption  Transfer from reserve: assessable amount  K \$
CGT small business 15-year exemption amount  Transfer from reserve: non-assessable amount
Personal injury election  Contributions from non-complying funds
and previously non-complying funds  Spouse and child contributions  T \$
Any other contributions (including Super Co-contributions and Low Income Super Amounts)
G \$, M \$,
TOTAL CONTRIBUTIONS N \$ 9,144-20 (Sum of labels A to M)
Other transactions  Allocated earnings or losses  \$\infty\$ \$\]  Other transactions
Accumulation phase account balance  S1 \$
Outward rollovers and transfers  Retirement phase account balance
S2 \$ Lump Sum payments Code
Retirement phase account balance  - CDBIS  Income etreem payments
S3 \$ Income stream payments  R2 \$ Income stream payments
TRIS Count  CLOSING ACCOUNT BALANCE S \$,,,,,,,
Accumulation phase value X1 \$,,
Retirement phase value X2 \$,,
Outstanding limited recourse borrowing arrangement amount

MEMBER 8
Title: Mr Mrs Miss Ms Other Account status
Family name  MOLUER
First given name  Other given names,  LUNETTE  Other given names,
Member's TFN Date of birth If decased date of death
See the Privacy note in the Declaration.  Day Month Year  Day Month Year  Day Month Year  Day Month Year
Contributions  OPENING ACCOUNT BALANCE \$ , , , , , , , , , , , , , , , , , ,
Refer to instructions for completing these labels.  Proceeds from primary residence disposal      State of the second secon
Employer contributions  Day Month Year
A\$,,,,
A1
Personal contributions  Non-assessable foreign superannuation fund amount  J \$
CGT small business retirement exemption  Transfer from reserve; assessable amount
C\$, K\$, K\$, K\$
D \$,
Personal injury election  Contributions from non-complying funds and previously non-complying funds
Spouse and child contributions  T\$ , , , , , , , , , , , , , , , , , , ,
F \$,, Any other contributions (including Super Co-contributions and Low Income Super Amounts)
G \$,
TOTAL CONTRIBUTIONS N \$ , 9,974-29 (Sum of labels A to M)
Other transactions  Allocated earnings or losses  Loss
Inwerd rollowers and transfors
Accumulation phase account balance  S1 \$
Retirement phase account balance
S2 \$ Lump Sum payments Code
Retirement phase account balance
S3 \$
CLOSING ACCOUNT BALANCE S \$,,,
Accumulation phase value X1 \$,
Retirement phase value X2 \$
Outstanding limited recourse

MEMBER 9	
Title: Mr Mrs Miss Ms Other	Account Code
Family name	status
First given name Other div	/en names
Member's TFN Date of birth	If deceased, date of death
See the Privacy note in the Declaration.  Day Month	Year Day Month Year
Contributions OPENING ACCOUNT BALANCE	
OF ENING ACCOUNT BALANCE	
Refer to instructions for completing these labels.	Proceeds from primary residence disposal
	H\$
Employer contributions	Day Month Year
A \$,	H1 Receipt date / / / / / / / / / / / / / / / / / / /
ABN of principal employer	Assessable foreign superannuation fund amount
A1	
Personal contributions	Non-assessable foreign superannuation fund amount
B \$	J\$
CGT small business retirement exemption	Transfer from reserve: assessable amount
C \$	K \$
CGT small business 15-year exemption amount	Transfer from reserve: non-assessable amount
D \$	L\$
Personal injury election	Contributions from non-complying funds
E \$	and previously non-complying funds
Spouse and child contributions	T\$
F \$	Any other contributions (including Super Co-contributions and Low Income Super Amounts)
Other third party contributions  G \$	M \$
G \$	
TOTAL CONTRIBUTIONS	N \$
TOTAL SONTINGO	(Sum of labels <b>A</b> to <b>M</b> )
	Allocated comings or leader
Other transactions	O \$ S S S S S S S S S S S S S S S S S S
	Inward rollovers and transfers
Accumulation phase account balance	P\$
S1 \$,	Outward rollovers and transfers
Retirement phase account balance	Q \$
- Non CDBIS	Lump Cum noumanta
\$2 \$,	Lump Sum payments  Code
Retirement phase account balance	
- CDBIS <b>S3 \$                                   </b>	Income stream payments Code
95 \$	R2 \$
TRIS Count CLOSING ACCOUNT BALANCE	
TRIS Count CLOSING ACCOUNT BALANCE	\$ \$,, (S1 plus S2 plus S3)
	(31 pius 32 pius 33)
Accumulation phase value	X1 \$
Retirement phase value	Y2 \$
Outstanding limited recourse borrowing arrangement amount	Y \$

MEMBER 10 Code
Title: Mr Mrs Miss Ms Other Account status
First given name Other given names
Member's TFN See the Privacy note in the Declaration.  Date of birth Day Month Year  If deceased, date of death Day Month Year
Contributions OPENING ACCOUNT BALANCE \$ , , , , , , , , , , , , , , , , , ,
Proceeds from primary residence disposal
H\$
Employer contributions  A \$ Day Month Year  Page 1
ABN of principal amplayor
Assessable foreign superannuation fund amount
Personal contributions  Non-assessable foreign superannuation fund amount
CGT small business retirement exemption  Transfer from reserve: assessable amount
CGT small business 15-year exemption amount
D \$ Transfer from reserve: non-assessable amount  L \$ Transfer from reserve: non-assessable amount
Personal injury election  Contributions from non-complying funds
and previously non-complying funds
Spouse and child contributions  T \$,
Other third party contributions  Co-contributions and Low Income Super Amounts)
G \$ , M \$ ,
TOTAL CONTRIBUTIONS N \$
(Sum of labels A to M)
Allocated earnings or losses Loss
Other transactions O \$
Accumulation phase account balance
S1 \$, P \$,
Retirement phase account balance  Non CDBIS  Outward rollovers and transfers  Q \$
- Non CDBIS  S2 \$ Lump Sum payments Code
Retirement phase account balance
- CDBIS Income stream payments Code
\$3 \$ ,
TRIS Count CLOSING ACCOUNT BALANCE \$ \$
(S1 plus S2 plus S3)
Accumulation phase value X1 \$
Retirement phase value X2 \$,
Outstanding limited recourse borrowing arrangement amount

MEMBER 11  Code	
Title: Mr Mrs Miss Ms Other Account status	
First given name Other given names	
Member's TFN  Date of birth  If decreased date of death	
Member's TFN See the Privacy note in the Declaration.  Day Month Pear  Date of birth Day Month Pear  Day Month Pear  Day Month	
Contributions OPENING ACCOUNT BALANCE \$	
Proceeds from primary residence disposal  H \$	
Employer contributions  Day Month Year	
ABN of principal employer	
Assessable foreign superannuation fund amount	
Personal contributions  Non-assessable foreign superappuation fund amount	
B\$ J\$ J\$ CGT small business retirement exemption	
Transfer from reserve: assessable amount  K \$	
CGT small business 15-year exemption amount	
L\$ DO	
Personal injury election  Contributions from non-complying funds and previously non-complying funds	
Spouse and child contributions  T \$	
F\$ Any other contributions (including Super	
Other third party contributions  Co-contributions and Low Income Super Amounts)  M \$	
TOTAL CONTRIBUTIONS N \$,,	
(Sum of labels <b>A</b> to <b>M</b> )  Allocated earnings or losses  Loss	
Other transactions  O \$    \text{	
Accumulation phase account balance Inward rollovers and transfers	
S1 \$ P \$ ,	
Retirement phase account balance  Non CDRIS  Outward rollovers and transfers  Q \$	
- Non CDBIS  S2 \$ Lump Sum payments Code	
Retirement phase account balance	
- CDBIS Income stream payments Code	
\$3 \$ , , R2 \$ , ,	
TRIS Count CLOSING ACCOUNT BALANCE \$\$	
(S1 plus S2 plus S3)	
Accumulation phase value X1 \$	
Retirement phase value X2 \$	
Outstanding limited recourse Ve Company Compan	

MEMBER 12	Code		
Title: Mr Mrs Miss Ms Other	Account status		
Family name			
First given name Other giv	ven names		
Member's TFN See the Privacy note in the Declaration.  Date of birth Day Month	If deceased, date of death  Year Month Year		
Contributions OPENING ACCOUNT BALANCE	\$		
•	Proceeds from primary residence disposal		
Refer to instructions for completing these labels.	H\$ D.		
Employer contributions  A \$	Day Month Year		
ABN of principal employer	H1 Receipt date / / / / / / / / / / / / / / / / / / /		
A1	Assessable foreign superannuation fund amount		
Personal contributions	Non-assessable foreign superannuation fund amount		
CGT small business retirement exemption	J\$,		
C \$	Transfer from reserve: assessable amount		
CGT small business 15-year exemption amount	Transfer from reserve: non-assessable amount		
D \$,	L\$		
Personal injury election  E \$	Contributions from non-complying funds and previously non-complying funds		
Spouse and child contributions	T \$		
F\$,,	Any other contributions (including Super		
Other third party contributions  G \$	Co-contributions and Low Income Super Amounts)  M \$		
TOTAL CONTRIBUTIONS	N \$,		
	(Sum of labels A to M)		
Other transactions	Allocated earnings or losses  O \$ Loss		
Accumulation phase account balance	Inward rollovers and transfers		
S1 \$	P \$		
Retirement phase account balance	Outward rollovers and transfers  Q \$		
- Non CDBIS S2 \$	Lump Cum no monto		
	R1 \$ Code		
Retirement phase account balance - CDBIS	Income stream payments Code		
S3 \$ , ,	R2 \$		
TRIS Count CLOSING ACCOUNT BALANCE \$ \$			
SECONT BALANCE	(S1 plus S2 plus S3)		
Accumulation phase value	X1 \$		
Retirement phase value )			
Outstanding limited recourse borrowing arrangement amount	Y \$		

Section H: Assets and liabilities				
<ul><li>15 ASSETS</li><li>15a Australian managed investments</li></ul>	Listed trusts	A \$		
	Unlisted trusts	B \$		
	Insurance policy	<b>c</b> \$		
Othe	r managed investments	D \$		
15b Australian direct investments	Cash and term deposits	E \$		
Limited recourse borrowing arrangements  Australian residential real property	Debt securities	F \$		
J1 \$	Loans	<b>G</b> \$[		
Australian non-residential real property  J2 \$	Listed shares	H \$		
Overseas real property	Unlisted shares	1\$		
J3 \$,,,,b	Limited recourse orrowing arrangements	J \$[		
J4\$,,	Non-residential real property	<b>K</b> \$[	,,	
J5 \$	Residential real property	L \$	,	
Other  J6 \$	Collectables and personal use assets	<b>M</b> \$[	,	
Property count	Other assets	<b>o</b> \$[	,,∞	
J7				
15c Other investments	Crypto-Currency	N \$		
15d Overseas direct investments	Overseas shares	P \$		
Overseas non-residential real property Q \$				
Overseas residential real property R \$,				
Overseas managed investments S \$ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \				
Other overseas assets T\$				
TOTAL AUSTRALIAN AND OVERSEAS ASSETS U\$ , , , , , , , , , , , , , , , , , ,			,	
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?				

Г

15f	Limited recourse borrowing arrangements If the fund had an LRBA were the LRBA	
		A No Yes
	Did the members or related parties of the fund use personal guarantees or other security for the LRBA?	B No Yes
16	LIABILITIES	
	Borrowings for limited recourse borrowing arrangements  V1 \$	
	v3 \$ , ,	Borrowings V \$,,
(	Total member closing total of all CLOSING ACCOUNT BALANCEs from	mg account balances m Sections F and G) W \$
		Reserve accounts X \$
		Other liabilities Y \$,
		TOTAL LIABILITIES Z \$
<u></u>	ation I. Tanasian 66	
5ec	Ction I: <b>Taxation of financial</b> Taxation of financial arrangements (TOFA	arrangements
		Total TOFA gains H \$
		Total TOFA losses   \$   ,       ,       -500
	tion I OII	
	ction J: Other information	
	ly trust election status the trust or fund has made, or is making, a family specified of the election (for exan	/ trust election, write the four-digit income year nple, for the 2021–22 income year, write 2022).
	If revoking or varying a family trust ele and complete and attach the Fai	ection, print <b>R</b> for revoke or print <b>V</b> for variation, mily trust election, revocation or variation 2022.
Interp	posed 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 <i>Interposed entity election or revocation 2022</i> for each election.		
	If revoking an in and attach the	nterposed entity election, print <b>R</b> , and complete e Interposed entity election or revocation 2022.

### 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 and any additional documents are true and correct in every detail. If you leave labels blank, you will have specified a zero amount or the label was not applicable to you. If you are in doubt about any aspect of the annual return, place all the facts before the ATO. 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 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. Taxation law authorises the ATO to collect information and disclose it to other government agencies. For information about your privacy go to ato.gov.au/privacy TRUSTEE'S OR DIRECTOR'S DECLARATION: 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, Authorised trustee's, director's or public officer's signature SMoller Date 07/03/2023 Moss Preferred trustee or director contact details: Family name MOLLER RODN Phone number Email address Non-individual trustee name (if applicable SUZ F ABN of non-individual trustee Time taken to prepare and complete this annual return Hrs The Commissioner of Taxation, as Registrar of the Australian Business Register, may use the ABN and business details which you

**TAX AGENT'S DECLARATION:** 

I declare that the Self-managed superannuation fund annual return 2022 has been prepared in accordance with information provided by the trustees, that the trustees have given me a declaration stating that the information provided to me is true and correct, and that the trustees have authorised me to lodge this annual return.

provide on this annual return to maintain the integrity of the register. For further information, refer to the instructions.

correct, and that the trustees have authorised me to lodge this annual return.	
Tax agent's signature	
0	
	Day Month Year
	Date / / / /
Towns and the state of the stat	
Tax agent's contact details	
Title: Mr X Mrs Miss Ms Other	
Family name	
LIVINGSTONE	
First given name Other given names	
SIMON	
Tax agent's practice	
SIMMONS LIVINGSTONE 1 ASS	OCIATES PIL
Tax agent's phone number Reference number	Tax agent number
0755618800 MOLLM51	
	24659 936



# Capital gains tax (CGT) schedule 2022

When completing this form Use in conjunction with company, trust, fund Print clearly, using a black or dark blue pen only. income tax return or the self-managed Use BLOCK LETTERS and print one character in each box. superannuation fund annual return. Refer to the Guide to capital gains tax 2022 1 7 4 8 7 available on our website at ato.gov.au for instructions on how to complete this schedule. Do not use correction fluid or covering stickers. Sign next to any corrections with your full signature (not initials). 504 Tax file number (TFN) We are authorised by law to request your TFN. You do not have to quote your TFN. However, if you don't it could increase the chance of delay or error in processing your form. **Australian business number (ABN)** Taxpayer's name Current year capital gains and capital losses Capital gain Capital loss Shares in companies listed on an Australian A \$ securities exchange Other shares B \$ Units in unit trusts listed on an Australian C \$ securities exchange Other units D \$ Real estate situated in Australia Other real estate F Amount of capital gains from a trust (including a managed fund) Collectables H \$ Other CGT assets and any other CGT events Amount of capital gain Add the amounts at labels K to R and write previously deferred the total in item 2 label A - Total current year under transitional \$ capital losses. CGT relief for superannuation funds Total current year 74,558 capital gains

2	Capital losses											
	Total current year capital losses	<b>A</b> \$[		],[			],[			, [		·×
	Total current year capital losses applied	B\$					],[_			,		·><
	Total prior year net capital losses applied	c \$		],[			],[					-><
	Total capital losses transferred in applied (only for transfers involving a foreign bank branch o permanent establishment of a foreign financial entity	D \$		],[			],[			,		]·×
	Total capital losses applied	E \$					].[					·%
		Add ar	moul	nts a	at B	Ca	and	D.				
3	Unapplied net capital losses carried forward											
	Net capital losses from collectables carried forward to later income years	A \$		],[			],[					-50
	Other net capital losses carried forward to later income years	_		],[			],[					-><
		Add and to labe to late	V -	Ne	t ca	pita	los	ses	car	ried f	orwa	al ard
								,		otari		
4	CGT discount											
4	CGT discount	A C		1			1	1		012	2	100
4	CGT discount  Total CGT discount applied	A \$[		],[			],[_	2	4,	85	3	]· <b>%</b>
5		A \$		],[			],[	2	4,	85	3	]-%
5	Total CGT discount applied			],[			],[	2	4,	85	3	-%   -%
5	Total CGT discount applied  CGT concessions for small business	A \$		],[			],[	2	4, 	85	3	·%
5	CGT concessions for small business  Small business active asset reduction	A \$ [ B \$ [		],[			],[],	2	<u></u> ,	85	3	·%   ·%
5	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption	A \$ [ B \$ [		],[				2	<b>4</b> , □, □, □, □,	85	3	·%   ·%   ·%
5	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption  Small business rollover  Total small business concessions applied	A \$ [ B \$ [ C \$ [		],[					(4), (1), (1), (1), (1),	85	3	·%   ·%   ·%
	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption  Small business rollover  Total small business concessions applied  Net capital gain	A \$ [ B \$ [ C \$ [ D \$ [		],[								·%
	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption  Small business rollover  Total small business concessions applied	A \$ [ B \$ [ C \$ [ D \$ [ 1J /ess	2E /	],[			], [	4 (can			S that	• ×   • ×   • ×   • ×
	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption  Small business rollover  Total small business concessions applied  Net capital gain	A \$ [ B \$ [ C \$ [ D \$ [	rans	fer t	he a	mou	unt a	4 (can	9,, not I		S that	• ×   • ×   • ×   • ×
	CGT concessions for small business  Small business active asset reduction  Small business retirement exemption  Small business rollover  Total small business concessions applied  Net capital gain	A \$ [ B \$ [ C \$ [ D \$ [ ] 1J less zero). Ti	rans	fer t	he a	mou	unt a	4 (can	9,, not I to la		S that	• ×   • ×   • ×   • ×

ч		
7	Earnout arrangements	
	Are you a party to an earnout arrangement? A Yes, as a buyer  Yes, as a seller	X
	(Print X in the appropriate box.)	
	If you are a party to more than one earnout arrangement, copy and attach a separate sheet to this schedule providing the details requested here for each additional earnout arrangement.	е
	How many years does the earnout arrangement run for?	
	What year of that arrangement are you in? C	
	If you are the seller, what is the total estimated capital proceeds from the earnout arrangement?	
	Amount of any capital gain or loss you made under your non-qualifying arrangement in the income year.	088
	Request for amendment If you received or provided a financial benefit under a look-through earnout right created in an earlier income year and you wish to seek an amendment to that earlier income year, complete the following:	u
	Income year earnout right created F	
	Amended net capital gain or capital losses carried forward G\$ , , , , , , , , , , , , , , , , , ,	JSS
8	Other CGT information required (if applicable)	
	Small business 15 year exemption – exempt capital gains A \$	DE
	Capital gains disregarded by a foreign resident B\$,	
	Capital gains disregarded as a result of a scrip for scrip rollover C\$	
	Capital gains disregarded as a result of an inter-company asset rollover D\$	
	Capital gains disregarded by a demerging entity E\$	

## Taxpayer's declaration

If the schedule is not lodged with the income tax return you are required to sign and date the schedule.

#### **Important**

Before making this declaration check to ensure that all the information required has been provided on this form and any attachments

are in doubt about any aspect of the tax s for false or misleading statements.
nent agencies. This includes personal ur privacy go to <b>ato.gov.au/privacy</b>
Date  Day  Month  Year  0 7 / 03 / 2023