



24 March 2023

Assoc Prof John Svigos
424 Carrington St
ADELAIDE SA 5000

Claire Haddad
6A/938 SOUTH ROAD
EDWARDSTOWN SA 5039
0881939655
tax@beancrunchers.com.au
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Dear JOHN,

We enclose your completed Self Managed Superannuation Fund Tax return for THE SVIGOS FAMILY SUPERANNUATION FUND for the period ending **30 June 2022**.

Please review every page of the accompanying return to confirm all items are true and correct and then **sign, date and send** the declarations that are enclosed at the front of the tax return.

The tax return will be lodged electronically once we have received the signed and dated declarations.

Our tax estimate shows an amount refundable of **\$8,271.55**. This has been calculated based on the information you have supplied to us. This is an estimate only.

Pay the ATO electronically or by mail by the due date to avoid interest and penalties.

If you have any questions or require further information then please do not hesitate to contact Claire Haddad on 0881939655.

Yours sincerely,

Claire Haddad

SMSF Tax Return**2022**

1 Jul 2021—30 Jun 2022

TFN Recorded

PART A ELECTRONIC LODGMENT DECLARATION (FORM P, T, F, SMSF OR EX)

This declaration is to be completed where the tax return is to be lodged via the Tax Office's electronic lodgment service (ELS). 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.

Privacy

The 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 However, you cannot lodge your tax return electronically if you do not quote your TFN.

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

The Australian Business Register

The Commissioner of Taxation, as Registrar of the Australian Business Register, may use the ABN and business details which you provide on this tax return to maintain the integrity of the register.

Please refer to the privacy statement on the Australian Business Register (ABR) website (www.abr.gov.au) for further information – it outlines our commitment to safeguarding your details.

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	Name of partnership, trust, fund or entity	Year
TFN Recorded	THE SVIGOS FAMILY SUPERANNUATION FUND	2022

I authorise my tax agent to electronically transmit this tax return via the electronic lodgment service.

Important

Before making this declaration please check to ensure that all income has been disclosed and the tax return is true and correct in every detail. 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 penalties for false or misleading statements on tax returns.

Declaration - I declare that:

- the information provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- the agent is authorised to lodge this tax return.

Signature of partner, trustee or director	Date

PART B ELECTRONIC FUNDS TRANSFER CONSENT

This declaration is to be completed when an electronic funds transfer EFT of a refund is requested and the tax return is being lodged through the electronic lodgment service ELS.

This declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.

Important

Care should be taken when completing EFT details as the payment of any refund, including any family tax benefit, will be made to the account specified.

<u>Agent Ref No.</u>	<u>BSB Number</u>	<u>Account Number</u>	<u>Account Name</u>
24738671	105148	030292040	The Svigos Family Superannuation

I authorise the refund to be deposited directly to the account specified.

Signature	Date
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PART D TAX AGENTS CERTIFICATE (SHARED FACILITIES USERS ONLY)

<u>Client Ref</u>	<u>Agent Ref No.</u>	<u>Contact Name</u>	<u>Contact No.</u>
	24738671	Claire Haddad	0881939655

Declaration - I declare that:

- I have prepared this tax return and/or family tax benefit tax claim in accordance with the information supplied by the taxpayer
- I have received a declaration made by the taxpayer that the information provided to me for the preparation of this document is true and correct, and
- I am authorised by the taxpayer to lodge this tax return and any applicable schedules that are attached.

Agent's Signature	Date
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Section A: Fund information

Period start 01/07/2021

Period end 30/06/2022

1 TAX FILE NUMBER TFN Recorded

2 NAME OF SELF-MANAGED SUPERANNUATION FUND (SMSF) THE SVIGOS FAMILY SUPERANNUATION FUND

3 AUSTRALIAN BUSINESS NUMBER 72 455 665 594

4 CURRENT POSTAL ADDRESS

Address	Town/City	State	Postcode
424 Carrington St	ADELAIDE	SA	5000

5 ANNUAL RETURN STATUS

Is this the first required return for a newly registered SMSF? No

6 SMSF AUDITOR

Title Mr

First name ANTHONY

Family name BOYS

SMSF auditor number 100014140

Auditor Address	Town/City	State	Postcode
PO BOX 3376	RUNDLE MALL	SA	5000

Was part A of the audit report qualified? B No

Was part B of the audit report qualified? C No

7 ELECTRONIC FUNDS TRANSFER (EFT)

A. Fund's financial institution account details

BSB number 105148

Account number 030292040

Account name The Svigos Family Superannuation

I would like my tax refunds made to this account Yes

8 STATUS OF SMSF

Australian superannuation fund? A Yes

Fund benefit structure B A

Does the fund trust deed allow acceptance of the Government's Super Co-contribution and Low Income Super Contribution? C Yes

10 EXEMPT CURRENT PENSION INCOME

Did the fund pay retirement phase superannuation income stream benefits to one or more members in the income year? Yes

Exempt current pension income amount **A** \$89,005.00

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

Was an actuarial certificate obtained? **D** Yes

Did the fund have any other income that was assessable? **E** 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 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.

Section B: Income**11 INCOME**

Prior year losses brought forward

Net capital gain **A** \$0.00

Gross income **W** \$0.00

Total assessable income **V** \$0.00

Section C: Deductions and non-deductible expenses**12 DEDUCTIONS**

		Deductions		Non-Deductible Expenses
Other depreciation				\$908.00
Decline in value of depreciating assets	E1		E2	\$908.00
SMSF auditor fee	H1	\$0.00	H2	\$385.00
Investment expenses	I1	\$0.00	I2	\$22,419.00
Management and administration expenses	J1	\$0.00	J2	\$3,734.00
Totals	N	\$0.00	Y	\$27,446.00
Total SMSF expenses		(N + Y)	Z	\$27,446.00
Taxable income or loss	(TOTAL ASSESSABLE INCOME less TOTAL DEDUCTIONS)			O \$0.00

Section D: Income tax calculation statement**13 CALCULATION STATEMENT**

Tax on taxable income **T1** \$0.00

Tax on no-TFN-quoted contributions **J** \$0.00

Gross tax **B** \$0.00

Subtotal **(B less C - cannot be less than zero)** **T2** **\$0.00**

Non-refundable carry forward tax offsets	(D1 + D2 + D3 + D4)	D	\$0.00
Early stage venture capital limited partnership tax offset		D1	\$0.00
Early stage venture capital limited partnership tax offset carried forward from previous year		D2	\$0.00
Early stage investor tax offset		D3	\$0.00
Early stage investor tax offset carried forward from previous year		D4	\$0.00
Subtotal	(T2 less D – cannot be less than zero)	T3	\$0.00
REFUNDABLE TAX OFFSETS	(E1 + E2 + E3 + E4)	E	\$8,530.55
Complying fund's franking credits tax offset		E1	\$8,530.55
Exploration credit tax offset		E4	\$0.00
Tax Payable		T5	\$0.00
Eligible credits	(H1 + H2 + H3 + H5 + H6 + H8)	H	\$0.00
Credit for TFN amounts withheld from payments from closely held trusts		H5	\$0.00
Credit for amounts withheld from foreign resident capital gains withholding		H8	\$0.00
Tax offset refunds (Remainder of refundable tax offsets)		I	\$8,530.55
Supervisory levy		L	\$259.00
Supervisory levy adjustment for wound up funds		M	\$0.00
Supervisory levy adjustment for new funds		N	\$0.00
Amount refundable		S	\$8,271.55

Section H: Assets and liabilities

15	ASSETS		
15b	Australian direct investments		
	Cash and term deposits	E	\$176,384.00
	Listed shares	H	\$413,656.00
	Residential real property	L	\$4,760,000.00
	Other assets	O	\$12,549.00
15d	Overseas direct investments		
	Total Australian and overseas assets	U	\$5,362,589.00

16 LIABILITIES

Total member closing account balances	W	\$5,359,778.00
Other liabilities	Y	\$2,811.00
Total liabilities	Z	\$5,362,589.00

Section K : Declarations**PREFERRED TRUSTEE OR DIRECTOR CONTACT DETAILS**

Title	Associate Professor
First name	JOHN
Other name	MICHAEL
Family name	SVIGOS
Contact number	04 12830320
Email address	john@svigos.com.au

TAX AGENT'S CONTACT DETAILS

First name	Bean
Family name	Crunchers
Contact number	08 81939655

Member 1 — SVIGOS, JOHN MICHAEL (TFN Recorded)Account status OpenTax File Number TFN Recorded**INDIVIDUAL NAME**Title Associate ProfessorGiven name JOHNOther given names MICHAELFamily name SVIGOS

Suffix

Date of birth 15 Jun 1945

Date of death

CONTRIBUTIONSOpening account balance \$1,310,900.47Employer contributions **A**Principal Employer ABN **A1**Personal contributions **B**CGT small business retirement exemption **C**CGT small business 15 year exemption **D**Personal injury election **E**Spouse and child contributions **F**Other third party contributions **G**Proceeds from primary residence disposal **H**Receipt date **H1**Assessable foreign superannuation fund amount **I**Non-assessable foreign superannuation fund amount **J**Transfer from reserve: assessable amount **K**Transfer from reserve: non-assessable amount **L**Contributions from non-complying funds and previously non-complying funds **T**Any other contributions (including Super Co-contributions and Low Income Super Contributions) **M****Total Contributions** **N**

OTHER TRANSACTIONS

Allocated earnings or losses	O	\$1,265,314.08
Inward rollovers and transfers	P	
Outward rollovers and transfers	Q	
TRIS Count		
Accumulation phase account balance	S1	
Retirement phase account balance - Non CDBIS	S2	\$2,537,014.55
Retirement phase account balance - CDBIS	S3	
Accumulation phase value	X1	
Retirement phase value	X2	
Outstanding Limited recourse borrowing arrangement	Y	
Lump Sum payment	R1	
Income stream payment	R2	\$39,200.00
Closing account balance	S	\$2,537,014.55

Member 2 — SVIGOS, ESTHER (TFN Recorded)

Account status	Open
Tax File Number	TFN Recorded
INDIVIDUAL NAME	
Title	Mrs
Given name	ESTHER
Other given names	
Family name	SVIGOS
Suffix	
Date of birth	15 Oct 1947
Date of death	
CONTRIBUTIONS	
Opening account balance	\$1,463,619.67
Employer contributions	A
Principal Employer ABN	A1
Personal contributions	B
CGT small business retirement exemption	C
CGT small business 15 year exemption	D
Personal injury election	E
Spouse and child contributions	F
Other third party contributions	G
Proceeds from primary residence disposal	H
Receipt date	H1
Assessable foreign superannuation fund amount	I
Non-assessable foreign superannuation fund amount	J
Transfer from reserve: assessable amount	K
Transfer from reserve: non-assessable amount	L
Contributions from non-complying funds and previously non-complying funds	T
Any other contributions (including Super Co-contributions and Low Income Super Contributions)	M
Total Contributions	N

OTHER TRANSACTIONS

Allocated earnings or losses	O	\$1,397,944.35
Inward rollovers and transfers	P	
Outward rollovers and transfers	Q	
TRIS Count		
Accumulation phase account balance	S1	
Retirement phase account balance - Non CDBIS	S2	\$2,822,764.02
Retirement phase account balance - CDBIS	S3	
Accumulation phase value	X1	
Retirement phase value	X2	
Outstanding Limited recourse borrowing arrangement	Y	
Lump Sum payment	R1	
Income stream payment	R2	\$38,800.00
Closing account balance	S	\$2,822,764.02

Capital Gains Tax Schedule

1 CURRENT YEAR CAPITAL GAINS AND CAPITAL LOSSES	Capital gains	Capital losses
Shares in companies listed on an Australian securities exchange	A	K
Other shares	B	L
Units in unit trusts listed on an Australian securities exchange	C	M
Other units	D	N
Real estate situated in Australia	E	O
Other real estate	F	P
Amount of capital gains from a trust (including a managed fund)	G	
Collectables	H	Q
Other CGT assets and any other CGT events	I	R
Amount of capital gain previously deferred under transitional CGT relief for superannuation funds	S	\$0.00
Total current year	J	\$0.00 A
2 CAPITAL LOSSES		
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 or permanent establishment of a foreign financial entity)		D
Total capital losses applied		E
3 UNAPPLIED NET CAPITAL LOSSES CARRIED FORWARD		
Net capital losses from collectables carried forward to later income years		A
Other net capital losses carried forward to later income years		B
4 CGT DISCOUNT		
Total CGT discount applied		A
5 CGT CONCESSIONS FOR SMALL BUSINESS		
Small business active asset reduction		A
Small business retirement exemption		B
Small business rollover		C
Total small business concessions applied		D \$0.00
6 NET CAPITAL GAIN		
		A \$0.00
1J less 2E less 4A less 5D (cannot be less than zero). Amount will appear at label A, Net capital gain on your tax return		
7 EARNOUT ARRANGEMENTS		
Income year earnout right created		F
Amended net capital gain or capital losses carried forward		G

8 OTHER CGT INFORMATION REQUIRED (IF APPLICABLE)

Small business 15 year exemption – exempt capital gains	A
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

Worksheets

10 EXEMPT CURRENT PENSION INCOME

EXEMPT CURRENT PENSION INCOME AMOUNT

Description	Amount
Imported from SF360	\$89,005.00
Total	\$89,005.00

11 INCOME

12 DEDUCTIONS

OTHER DEPRECIATION

Description	Deductible	Non deductible
Imported from SF360	\$0.00	\$908.00
Total	\$0.00	\$908.00

H SMSF auditor fee

Description	Deductible	Non deductible
Imported from SF360	\$0.00	\$385.00
Total	\$0.00	\$385.00

I Investment Expenses

Description	Deductible	Non deductible
Imported from SF360	\$0.00	\$22,419.00
Total	\$0.00	\$22,419.00

J Management and administration expenses

Description	Deductible	Non deductible
Imported from SF360	\$0.00	\$3,734.00
Total	\$0.00	\$3,734.00

13 CALCULATION STATEMENT**D1** Early stage venture capital limited partnership tax offset

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

D2 Early stage venture capital limited partnership tax offset carried forward from previous year

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

D3 Early stage investor tax offset

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

D4 Early stage investor tax offset carried forward from previous year

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

H5 Credit for TFN amounts withheld from payments from closely held trusts

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

H8 Credit for amounts withheld from foreign resident capital gains withholding

Description	Amount
Imported from SF360	\$0.00
Total	\$0.00

15 ASSETS**15b** AUSTRALIAN DIRECT INVESTMENTS**E** Cash and term deposits

Description	Amount
Imported from SF360	\$176,384.00
Total	\$176,384.00

H Listed shares

Description	Amount
Imported from SF360	\$413,656.00
Total	\$413,656.00

Residential real property

Description	Amount
Imported from SF360	\$4,760,000.00
Total	\$4,760,000.00

 Other assets

Description	Amount
Imported from SF360	\$12,549.00
Total	\$12,549.00

 16 LIABILITIES Other liabilities

Description	Amount
Imported from SF360	\$2,811.00
Total	\$2,811.00