fet-renged sigerannizous fund annual return

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 2023 (NAT 71287).

- The Self-managed superannuation fund annual return instructions 2023 (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 complete this annual return Print clearly, using a BLACK pen only.

Use BLOCK LETTERS and print one character per box.

3

Place X in ALL applicable boxes.

Postal address for annual returns:

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

For example;

Australian Taxation Office GPO Box 9845 SYDNEY NSW 2001

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- Tax file number (TFN) 8 58
- 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 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.

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Annual return status is this an amendment to the SMSF's 2023 return?

Yes A No

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

Yes



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8	Status of SMSF Australian superannuation fund A 140 Yes X Fund benefit structure & 7 Cade 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 X Yes) If yes, provide the date on which the fund was wound up / / / / / / / / / / / / / / / / / /
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. Ves X Exempt current pension income amount A \$
	Which method did you use to calculate your exempt current pension income? Segregated assets method
	Unsegregated assets method CX) Was an actuarial certificate obtained? D Yes X
	Did the fund have any other income that was assessable? E Yes X Go to Section B: Income.
	If you are entitled to claim any tax offsets, you can list

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	ar, there was no outer incom m any tax offsets, you can re	e SMSF were supporting superannuation income stream ne that was assessable, and you have not realised a de ecord these at Section D: Income tax calculation statem
Income Did you have a capital gains t (CGT) event during the yea	ax G No T ves X)	If the total capital loss or total capital gain is greater than \$10,000 or you elected to use the transitional CGT relie 2017 and the deferred notional gain has been realised, complete and attach a Capital gains tax (CGT) schedule.
Have you applied exemption or rollove		Code
	Net capital gain	n A \$ □ □ □, □ □ 0 -9€
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	Gross interest	cs 7,362-90
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This is a mandatory label.	GROSS INCOME (Sum of labels A to U)	
*If an amount is entered at this label, check the instructions	impt current pension income	Secretaria de la compansa del compansa de la compansa del compansa de la compansa del la compansa de la compansa del la compansa de la compan
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Section C: Deductions and non-deductible expenses

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Section D: Income tax calculation statement 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. 13 Calculation statement AS *Taxable income (an amount must be included even if it is zero) Please refer to the Self-managed superannuation *Tax on taxable 11 \$ 826 fund annual return instructions income (an amount must be included even if it is zero) 2023 on how to complete the *Tax on calculation statement. no-TFN-quoted JS contributions (an amount must be included even if it is zero) 826 Gross tax (T1 plus J) Foreign income tax offset 92.96 C1S Non-refundable non-carry forward tax offsets Rebates and tax offsets CS **C2**\$ (C1 plus C2) SUBTOTAL 1 TZS - cannot be less than zero) Early stage venture capital limited partnership tax offset 018 Early stage venture capital limited partnership tex offset carried forward from previous year Non-refundable carry forward tax offsets DS 028 (D1 plus D2 plus D3 plus D4) Early stage investor tax offset Das Early stage investor tax offset SUBTOTAL 2 carried forward from previous year TO S 048 (T2 less D - cannot be less than zero) Complying fund's franking credits tax offset EIS No-TFN tax offset E25 National rental affordability scheme tax offset E3S Refundable tax offsets Exploration credit tax offset **E4** \$ Sees and 941 (E1 plus E2 plus E3 plus E4) TAX PAYABLE T5 \$ 00 0 (T3 less € - cannot be less than zero) Section 102AAM interest charge GS