

Notice of intent to claim or vary a deduction for personal super contributions

Section A: Your details

1 Tax file number (TFN)

! The ATO does not collect this information provided on this form. This form is to assist you in providing details to your super fund. Your super fund is authorised to request your personal details, including your TFN, under the *Superannuation Industry (Supervision) Act 1993*, the *Income Tax Assessment Act 1997* and the *Taxation Administration Act 1953*. It is not an offence not to provide your TFN. However, if *you* do not provide your TFN, and your super fund doesn't already hold your TFN, they will not be permitted to accept the contribution(s) covered by this notice. For more information about your privacy please contact the entity you are providing this form to.

2 Name

Title:

Family name

First given name

Other given names

3 Date of birth

4 Current postal address

Suburb/town/locality

State/territory

Postcode

Country if outside of Australia

(Australia only)

(Australia only)

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

7 Fund Australian business number (ABN)

8 Member account number

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

10 Personal contribution details

Is this notice varying an earlier notice? No Yes

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.

If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

ORIGINAL NOTICE TO CLAIM A TAX DEDUCTION

11 Financial year ended 30 June 20

12 My personal contributions to this fund in the above financial year \$

13 The amount of these personal contributions I will be claiming as a tax deduction \$

Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

INTENTION TO CLAIM A TAX DEDUCTION

! Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included any of the contributions in an earlier valid notice.

*I declare that I am lodging this notice at the earlier of **either**:*

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, **or**
- before the end of the income year following the year in which the contribution was made.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

> Send your completed notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20


15 My personal contributions to this fund in the above financial year \$

16 The amount of these personal contributions claimed in my original notice of intent \$

17 The amount of these personal contributions I will now be claiming as a tax deduction \$

Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

 Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to **reduce** the amount stated in that notice.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that at the time of lodging this notice:

- *I intend to claim the personal contributions stated as a tax deduction*
- *I am a current member of the identified super fund*
- *the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.*

*I declare that I wish to vary my previous valid notice for these contributions by **reducing** the amount I advised in my previous notice and I confirm that either:*

- *I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or*

- *I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, or*


- *the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.*

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

 Send your completed variation notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

The Souvlis Family Super Fund

Contributions Breakdown Report

For The Period 01 July 2019 - 30 June 2020



Summary

Member	D.O.B	Age (at 30/06/2019)	Total Super Balance (at 30/06/2019) *1	Concessional	Non-Concessional	Other	Reserves	Total
Souvlis, Chris	Provided	60	1,970,254.73	20,000.00	0.00	0.00	0.00	20,000.00
Souvlis, Tina	Provided	60	541,357.72	0.00	0.00	0.00	0.00	0.00
All Members				20,000.00	0.00	0.00	0.00	20,000.00

*1 TSB can include information external to current fund's transaction records. The amount is per individual across all funds.

Contribution Caps

Member	Contribution Type	Contributions	Cap	Current Position
Souvlis, Chris	Concessional	20,000.00	25,000.00	5,000.00 Below Cap
	Non-Concessional	0.00	0.00	Total Super Balance Over TBC
Souvlis, Tina	Concessional	0.00	25,000.00	25,000.00 Below Cap
	Non-Concessional	0.00	100,000.00	100,000.00 Below Cap

Carry Forward Unused Concessional Contribution Cap

Member	2015	2016	2017	2018	2019	2020	Current Position
Souvlis, Chris							
Concessional Contribution Cap	35,000.00	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	0.00	35,000.00	30,000.00	25,000.00	25,000.00	20,000.00	
Unused Concessional Contribution	0.00	0.00	0.00	0.00	0.00	5,000.00	
Cumulative Carry Forward Unused	N/A	N/A	N/A	N/A	0.00	0.00	
Maximum Cap Available	35,000.00	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	5,000.00 Below Cap
Total Super Balance	0.00	0.00	0.00	1,564,002.12	1,735,773.66	1,970,254.73	

Souvlis, Tina							
Concessional Contribution Cap	35,000.00	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	0.00	0.00	0.00	0.00	0.00	0.00	
Unused Concessional Contribution	0.00	0.00	0.00	0.00	25,000.00	25,000.00	
Cumulative Carry Forward Unused	N/A	N/A	N/A	N/A	0.00	0.00	
Maximum Cap Available	35,000.00	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	25,000.00 Below Cap
Total Super Balance	0.00	0.00	0.00	439,023.06	479,246.06	541,357.72	

NCC Bring Forward Caps

Member	Bring Forward Cap	2017	2018	2019	2020	Total	Current Position
Souvlis, Chris	N/A	0.00	0.00	0.00	0.00	N/A	Bring Forward Not Triggered
Souvlis, Tina	N/A	229.83	301.05	7,611.36	0.00	N/A	Bring Forward Not Triggered

Souvlis, Chris

Date	Transaction Description	Ledger Data					SuperStream Data				
		Contribution Type	Concessional	Non-Concession	Other	Reserves	Contribution	Employer	Concessional	Non-Concess	Other
26/06/2020	SOUVLIS Trust Conc supe Souvlis Family Superannuat	Personal - Concessional	20,000.00								
Total - Souvlis, Chris			20,000.00	0.00	0.00	0.00			0.00	0.00	0.00
Total for all members			20,000.00	0.00	0.00	0.00					

The Souvlis Family Super Fund

Contributions Summary Report



For The Period 01 July 2019 - 30 June 2020

Chris Souvlis

Date of Birth:	Provided
Age:	61 (at year end)
Member Code:	SOUCHR00002A
Total Super Balance* ¹ as at 30/06/2019:	1,970,254.73

Contributions Summary	2020	2019
Concessional Contribution		
Personal - Concessional	20,000.00	0.00
Employer	0.00	25,000.00
	<hr/> 20,000.00	<hr/> 25,000.00
Total Contributions	<hr/> 20,000.00	<hr/> 25,000.00

I, CHRIS SOUVLIS, confirm that the amounts reported above are the total contributions deposited to the fund with respect of my member balance for the period 01/07/2019 to 30/06/2020.

CHRIS SOUVLIS

*1 TSB can include information external to current fund's transaction records. The amount is per individual across all funds.

The Souvlis Family Super Fund

Contributions Summary Report



For The Period 01 July 2019 - 30 June 2020

Tina Souvlis

Date of Birth:	Provided
Age:	61 (at year end)
Member Code:	SOUTIN00002A
Total Super Balance* ¹ as at 30/06/2019:	541,357.72

Contributions Summary	2020	2019
Non-Concessional Contribution		
Personal - Non-Concessional	0.00	7,611.36
	<hr/> 0.00	<hr/> 7,611.36
Total Contributions	<hr/> 0.00	<hr/> 7,611.36

I, TINA SOUVLIS, confirm that the amounts reported above are the total contributions deposited to the fund with respect of my member balance for the period 01/07/2019 to 30/06/2020.

TINA SOUVLIS

*1 TSB can include information external to current fund's transaction records. The amount is per individual across all funds.