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 an approved ATO electronic channel. 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 However, you cannot lodge your tax return electronically if you do not quote your TFN.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 disclose it to other government agencies, including personal information about the person authorised to sign the declaration. For information about 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	910 054 17	7			Year 202	1
lame of partnership, trust, fund or entity	Stephen &	Joy	Pulford	Private	Pension	Fund

I authorise my tax agent to electronically transmit this tax return via an approved ATO electronic channel.

Important

Ν

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 the 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 an approved ATO electronic lodgment channel.

This declaration must be signed by the partner, trustee, director or public officer 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 will be made to the account specified.

Agent's reference number	26	26128478					
Account Name	S	&	J	Pulford	Private	Pension	Fund

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

Signature

Date

Page 1 of 11

	Stephen & Joy Fullord Fil		1FN. 910 034 177	raye
	Self-manag fund annua	jed superar	nnuation	202 [•]
Who should complete this annual return		arreturn	Deturn veer	2021
Only self-managed superannuation funds (S complete this annual return. All other funds Fund income tax return 2021 (NAT 71287)			Return year	2021
The Self-managed superannuation fund instructions 2021 (NAT 71606) (the instr you to complete this annual return.				
The SMSF annual return cannot be used change in fund membership. You must via ABR.gov.au or complete the Change superannuation entities form (NAT3036	update fund details of details for			
Section A: Fund information		1		
Tax file number (TFN)	910 054 177			
The Tax Office is authorised by law to chance of delay or error in processing				crease the
Name of self-managed superan				
	Stephen & Joy 1	Pulford Private	Pension	
	Fund			
Australian business number (A	BN) 13 368 742 043]		
Current postal address	C/- Collin McKe	enzie		
	Post Office Boz	x 101		
	Virginia		QLD ·	4014
Annual return status Is this an amendment to the SMSF's 2 Is this the first required return for a ne				
SMSF auditor				
Auditor's name T	ïtle Mr			
Family na	me Boys			
First given na	me Anthony			
Other given nan	nes			
SMSF Auditor Num	ber 100 014 140			
Auditor's phone num	ber 0410 712708			
Use Agent N Postal addr	PO Box 3376			
	Rundle Mall		SA	5000
	Date audit was complete	d A		
	Was Part A of the audit r	eport qualified ?	BN	
	Was Part B of the audit r	eport qualified ?	C N	
	If Part B of the audit reported issues		D	

SMSF Return 2021 Stephen & Joy Pulford Private Pension Fund TFN: 910 054 177 Page 2 of 11 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 21636031 124001 Fund account number (must be six digits) Fund account name (for example, J&Q Citizen ATF J&Q Family SF) S & J Pulford Private Pension Fund Print Y for yes If Yes, Go to C. I would like my tax refunds made to this account. or N for no. Ν Use Agent Trust Account? 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 Fund account name (for example, J&Q Citizen ATF J&Q Family SF) C Electronic service address alias Provide the electronic service address (ESA) issued by your SMSF messaging provider (For example, SMSFdataESAAlias). See instructions for more information. Fund's tax file number (TFN) 910 054 177 8 Status of SMSF Australian superannuation fund Fund benefit structure Α Code Does the fund trust deed allow acceptance of the Government's Super Co-contribution and Low Income Super Contribution? 9 Was the fund wound up during the income year? Day Month Year Have all tax lodgment If yes, provide the date on Print Y for ves Ν and payment which fund was wound up or N for no obligations been met? 10 Exempt current pension income Did the fund pay retirement phase superannuation income stream benefits to one or more members Print Y for ves Ν or N for no. 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 If No, Go to Section B: Income If Yes Exempt current pension income amount A Which method did you use to calculate your exempt current pension income? Segregated assets method В Was an actuarial certificate obtained? Unsegregated assets method С D Print Y for yes Print Y for yes Did the fund have any other income that was assessable? Ξ If Yes, go to Section B: Income or N for 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

SMSF Return 2021

Stephen & Joy Pulford Private Pension Fund

TFN: 910 054 177 Page 3 of 11

ection B: Inc	ome					
retirement phase	this section if all superannuation into for the entire year, there was no oth you are entitled to claim any tax offse	ner income the	at was assess	sable, and you have not re	alised a deferred	
1 Income	Did you have a capital gains ta (CGT) event during the year?		Print Y for yes or N for no.	\$10,000 or you el the deferred notic	l loss or total capital gain is grea lected to use the CGT relief in 2 onal gain has been realised, co bital Gains Tax (CGT) schedule	2017 and mplete
	Have you applied ar exemption or rollover?		Print Y for yes or N for no.			
				Net capital gain	Α	
		Gross re	ent and other	leasing and hiring income	B 42,	020
				Gross interest	C 3,	389
			Fore	estry managed investment scheme income		
Gross f	oreign income			Net foreign income	D	Loss
	Aust	ralian frankin	a credits from	a New Zealand company	E	
			9	Transfers from foreign funds		Numbe
				Gross payments where	H	
	on of assessable contributions sable employer contributions	ABN not quoted Gross distribution from partnerships				Loss
R1	0			* Unfranked dividend amount	J	
plus Asses	ssable personal contributions			* Franked dividend amount	K	
	N-quoted contributions			* Dividend franking credit		
· ·	0 lust be included even if it is zero)			* Gross trust distributions	М	Code
insurar	fer of liability to life nce company or PST	Assessable contributions				
R6	0		(R1	plus R2 plus R3 less R6)		0
Calculatio	on of non-arm's length income					
* Net nor	n-arm's length private npany dividends					Code
U1				* Other income *Assessable income		
U2	on-arm's length trust distributions			due to changed tax status of fund		
plus * Net oth	her non-arm's length income		Net n	on-arm's length income (subject to 45% tax rate)		
instructions to	It is entered at this label, check the o ensure the correct tax			(U1 plus U2 plus U3) GROSS INCOME (Sum of labels A to U)	W	Loss
ueaument has	s been applied.	J	Exem	ot current pension income	Υ	
						Loss

Section C: Deductions and non-deductible expenses Deductions and non-deductible expenses 12 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 related to exempt current pension income should be recorded in the 'Non-deductible expenses' column). DEDUCTIONS NON-DEDUCTIBLE EXPENSES Interest expenses 18,991 **A1** A2 within Australia Interest expenses **B2 B1** overseas Capital works **D1** D2 expenditure Decline in value of **E1** E2 depreciating assets Insurance premiums -F2 F1 members SMSF auditor fee H1 H2 Investment expenses 1 2 Management and 6,002 J1 J2 administration expenses Forestry managed investment scheme expense **U1 U2** Code

Tax losses deducted

Other amounts

L1

Μ1

0

TOTAL DEDUCTIONS							
Ν	41,951						
	(Total A1 to M1)						

#TAXABLE INCOME OR LOSS

(TOTAL ASSESSABLE INCOME less

TOTAL DEDUCTIONS)

Code

ΤΟΤΑ	L SMSF EXPENSES
Ζ	41,951
	(N plus Y)

#This is a mandatory label.

Section D: Income tax calculation statement #Important:

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

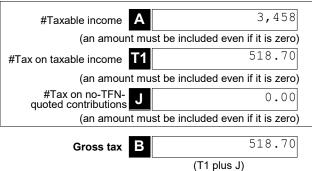
16,958

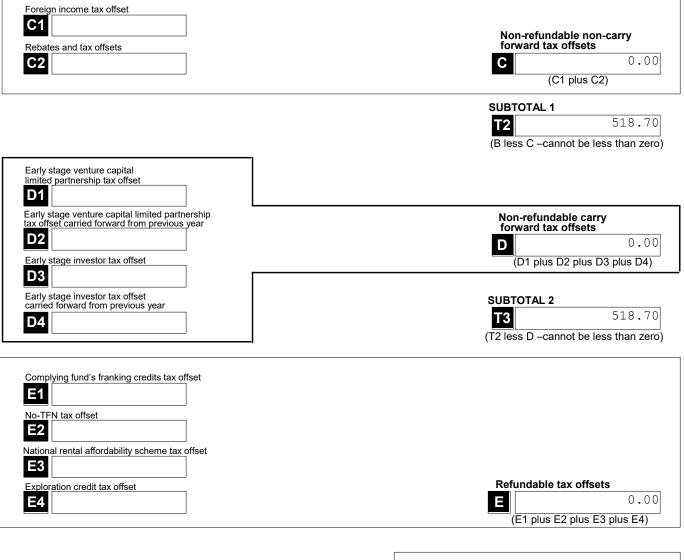
3,458

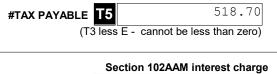
Loss

13 Calculation statement

Please refer to the Self-managed superannuation fund annual return instructions 2021 on how to complete the calculation statement.

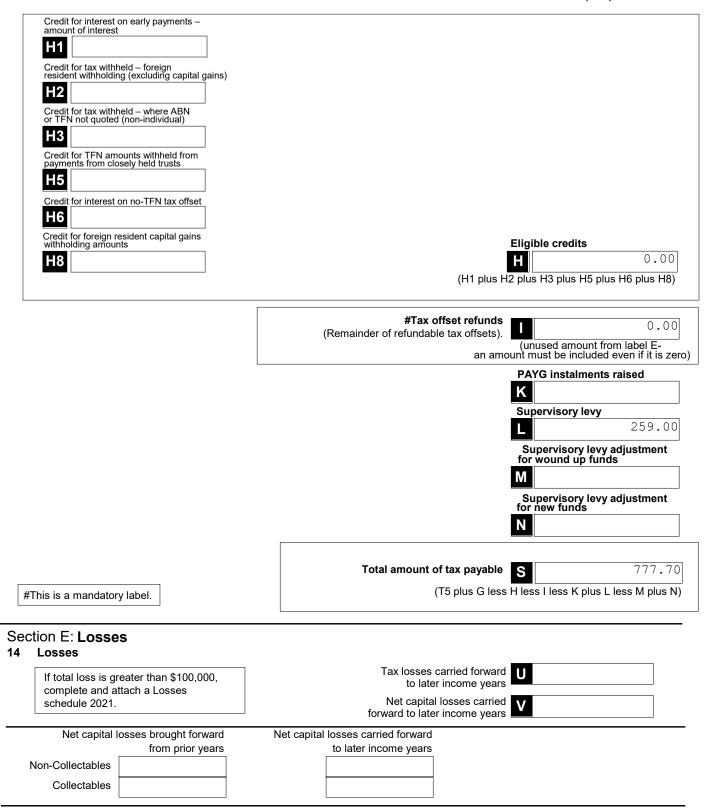






G

Fund's tax file number (TFN) 910 054 177



SMSF Return 2021

Stephen & Joy Pulford Private Pension Fund TFN: 910 054 177

	tion G: Member Infor			
Use Section F / G t	o report any former members	or deceased members who held an inter	rest in the fund at any	time during the income ye
		See the Privacy note in the	Declaration	Member Number
Title	EF	Member'sTFN 484 5		
Family name	Pulford			Account status
First given name	Stephen			
ther given names	Lawrence			
and given named		If deceased, 20	10010	
	Date of birth 13/07/196	date of death	/03/2014	
Contributions		OPENING ACCOUNT BALANC	E	0.00
Refer to instructior	ns for completing these labels		roceeds from primary	residence disposal
Employer contribu			eceipt date	
A			11	
ABN of principal e	emplover	A	Assessable foreign su	perannuation
A1		TL.	Ind amount	
Personal contribu	tions	Ν	on-assessable foreig	n superannuation
В		fu	ind amount	
CGT small busines	ss retirement exemption		J ransfer from reserve:	
С		a	ssessable amount	
CGT small busine exemption amour	ess 15-year		K	
D			ransfer from reserve: on-assessable amou	
Personal injury ele	ection			
Ε		C	ontributions from nor nd previously non-co	n-complying funds
Spouse and child	contributions			
F		A	ny other contribution	s (including
Other third party o	contributions	S In	uper Co-contribution come Super Contribu	s and low itions)
G		1	VI	
			.00	
	TOTAL CONTRIB	UTIONS N 0 (Sum of labels A to M		
) ther transaction			/	
	ase account balance			Loss
S1	0.00		0	
Retirement phase	e account balance	Inward rollovers and transfers	P	
- Non CDBIS	0.00	Outward rollovers and transfers	Q	
	e account balance	Lump Sum payment	1	Code
- CDBIS				Code
S3	0.00	Income stream payment R	2	
0 TR	IS Count	CLOSING ACCOUNT BALANCE	S1 plus S2 plus S	0.00
		Accumulation phase value	1	
		Retirement phase value	(2	
				1

					Fund's tax file nu	
				See the Privacy note in t		Member Number
Title	Mrs			Member'sTFN 483	683 879	2
Family name	Pulford					Account status
First given name	Joyce					O Code
Other given names	Anne					
	Date of birth	29/03/1958		If deceased, date of death]
Contributions			OPEN	ING ACCOUNT BALAN	CE 450	,094.28
Refer to instructio	ns for complet	ing these labels]		Proceeds from primary r H	esidence disposal
Employer contribution	utions				Receipt date	
Α					H1	
ABN of principal	employer				Assessable foreign sup fund amount	erannuation
A1						
Personal contribu	Itions				Non-assessable foreign	superannuation
В					fund amount	
CGT small busine	ess retirement	exemption			Transfer from reserve:	
С					assessable amount	
CGT small busin exemption amou	ess 15-year nt				K	
D					Transfer from reserve: non-assessable amount	
Personal injury el	ection				L	
E					Contributions from non-com and previously non-com	complying funds
Spouse and child	l contributions					
					Any other contributions	(including
Other third party	contributions				Super Co-contributions	and low
G					M	
	тс	TAL CONTRIBUT		Ν	0.00	
				(Sum of labels A to l	M)	
Other transactior	าร					
Accumulation ph			Allo	cated earnings or losses	0 2,	,939.76
S1 Retirement phas	449,215		Inward	d rollovers and transfers	Ρ	
- Non CDBIS			Outward	d rollovers and transfers	Q	
S2		.00		Lump Sum payment	R1 3.	Code 818.45 A
Retirement phas - CDBIS	e account bala	ance		Lump Sum payment		
S 3	0	.00		Income stream payment	R2	
	RIS Count		CLOSIN	IG ACCOUNT BALANCE	S 449,	,215.59
					S1 plus S2 plus S3	
			A	ccumulation phase value	X1 449	,215.59
				Retirement phase value	X2	
			Outs borrow	standing limited recourse ing arrangement amount	Υ	

Stephen & Joy Pulford Private Pension Fund	TFN: 910 054 177 Page 9 of
95	
Listed trusts	s A
Unlisted trusts	B
Insurance policy	
Other managed investments	s D
Cash and term deposits	s E 118,036
Debt securities	s F
ts Loans	G
Listed shares	s H
Unlisted shares	
Limited recourse borrowing arrangements	J
Non-residential real propert	/ K
Residential real property	L 607,031
Collectables and personal use assets	\$ M
Other assets	o 2,839
Crypto-Currency	/ N
Overseas shares	
Overseas non-residential real property	y Q
Overseas residential real property	y R
Overseas managed investments	S
Other overseas assets	5 T
TOTAL AUSTRALIAN AND OVERSEAS ASSETS (Sum of labels A to T)	U 727,906
a loan to, lease to or investment in, I parties (known as in-house assets) at the end of the income year Print Y for yes or N for no.	
ngements	
e fund had an LRBA were the LRBA borrowings from a licensed financial institution?	
he members or related parties of the nd use personal guarantees or other security for the LRBA?	
	BS Listed trusts S Listed trusts Unlisted trusts Insurance policy Other managed investments Debt securities Listed shares Listed shares Unlisted recourse borrowing arrangements Listed shares Limited recourse borrowing arrangements Collectables and personal use assets Collectables and personal use assets Other assets Other securities Other assets Crypto-Currency Overseas non-residential real property Overseas non-residential real property Overseas non-residential real property Overseas non-residential real property Overseas assets Overseas non-residential real property Overseas assets Collectables and personal use assets Collectables and personal use assets Overseas non-residential real property Overseas assets Overseas non-residential real property Overseas assets Other overseas assets Collectables A to T) Cal aloan to, lease to or investment in, do alues (Known as in-house assets) Print Y for yes at the end of the income year Image or N for no. Baloan to, lease to or investment in, do an LERA were the LRAA borrowings from a licensed or the nore Print Y

SMSF Return 2021

16 LIABILITIES

Borrowings for limited recourse	l	
Borrowings for limited recourse borrowing arrangements V1 278,172		
Permissible temporary borrowings		
Other borrowings	Borrowings	V 278,172
(total of all (W 449,215	
	Reserve accounts	Χ
	Other liabilities	Y 519
	TOTAL LIABILITIES	Z 727,906
Section I: Taxation of financial arra 7 Taxation of financial arrangements (TG	-	
	Total TOFA gains	Н
	Total TOFA losses	

Section J: Other information Family trust election status

If the trust or fund has made, or is making, a family trust election, write the four-digit income year specified of the election (for example, for the 2020–21 income year, write 2021).	
If revoking or varying a family trust election, print R for revoke or print V for variation, and complete and attach the Family trust election, revocation or variation 2021.	
Interposed 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 Interposed entity election or revocation 2021 for each election	
If revoking an interposed entity election, print R, and complete and attach the Interposed entity election or revocation 2021.	

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.

Privacy

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 (if required) 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

						Day Month Year	
					Date		
Preferred trustee or director cont	act detail	s:					
	Title	Mrs					
Fan	nily name	Mosedale					
First giv	iven name Antoinette						
Other give	en names	mes Anne					
			Number				
Phon	e number	07	38652990				
Emai	l address						
Non-individual trustee name (if ap	oplicable)						
ABN of non-individual trustee							
						Hrs	
		Time taken to p	repare and cor	nplete this annual retu	Irn		
The Commissioner of Taxation, as Re							
provide on this annual return to main	tain the inte	grity of the registe	er. For further i	nformation, refer to th	e instruction	S	
TAX AGENT'S DECLARATION:							
, COLLIN MCKENZIE							
declare that the Self-managed supe] ŀ
by the trustees, that the trustees ha the trustees have authorised me to			lung that the m	iormation provided to		Day Month Year	
Tax agent's signature					Date		
Tax agent's contact details	Maa						
Title	Mr						
,	Mckenzi	е					
First given name	Collin						
Other given names							
Tax agent's practice	COLLIN	MCKENZIE					
	Area code	Number					
j i	07	38652990	ر 				
Tax agent number	2612847	8		Reference number	PULF900	7	