

# Request to adjust concessional contributions

#### WHO SHOULD COMPLETE THIS FORM?

Only members of a self-managed superannuation fund (SMSF) can complete this form for contributions they made to their SMSF.

#### **COMPLETING THIS FORM**

The instructions contain important information

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.

The instructions contain important information about completing this form. Refer to them for more information about how to complete and lodge this form.

Se	ection A: <b>Your details</b>
1	Tax file number (TFN) 485467410
	You don't have to provide your TFN to us. However, if you do, it will help us identify you correctly and process your form quickly. For more information on privacy, refer to <b>ato.gov.au/privacy</b>
2	Full name
	Title: Mr Mrs Miss Ms Other
	Family name
	LARDER
	First given name Other given names
	JOHN
	Day Month Year
3	Date of birth 0 3 / 1 0 / 1 9 6 0
4	Current postal address
	Street address
	10 EDEN DRIVE
	Suburb/town/locality State/territory Postcode
	EATONS HILL         Q L D         4 0 3 7
	(Australia only) (Australia only)
5	Daytime phone number (include area code)
_	
Se	ection B: Self Managed Superannuation Fund Details
	The SMSF to which the concessional contributions to be adjusted were made:
6	What is your Australian business number (ABN)? 74024412510
7	Fund name
•	JOHN & DONNA LARDER SUPERANNUATION FUND

## Section C: Details of the financial years in which concessional contributions will be adjusted

8	Year 1 - The financial year in which the contributions referred to in Section D were made to the SMSF but not allocated to you:
	Year ending 30 June 2 0 2 3

9 Year 2 - The financial year in which the contributions referred to in Section D were <u>allocated</u> to you by the SMSF's trustees:

Year ending 30 June 2 0 2 4

### Section D: Details of concessional contributions to be adjusted

**10 Personal Contributions –** The amount of the personal contributions you made to the SMSF in Year 1, which were not allocated until Year 2, and for which you will be claiming a tax deduction in Year 1.



- In the SMSF annual return for Year 1, these contributions will be included as 'assessable personal contributions' in Section B and as 'personal contributions' made by you in Section F or G.
- **11 Employer Contributions** The amount of the employer contributions, including salary sacrifice contributions, your employer made to the SMSF in Year 1 and which were not allocated to you until Year 2.

<b>\$</b> 2 7 5 0 0 0 0	\$		2	7	5	0	0	0	0
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In the SMSF annual return for Year 1, these contributions will be included as 'assessable employer contributions' in Section B and as 'employer contributions' made on your behalf in Section F or G.

### Section E: Declaration

#### **Privacy**

The ATO is a government agency bound by the Privacy Act 1988 in terms of collection and handling of personal information and TFNs. For further information about privacy law notices go to ato.gov.au/privacy

Complete the declaration that applies to you. Print your full name then sign and date the declaration.

#### INDIVIDUAL DECLARATION

I declare that the information contained in this form is true and correct.

Name (Print in BLOCK LETTERS)

JOHN LARDER

#### Signature

Johu Larder

Date

10-2023

#### AGENT OR AUTHORISED OFFICER DECLARATION

complete this declaration if you are an authorised representative of the individual shown in Section A.

I declare that:

- I have prepared the form with the information supplied by the individual
- I have received a declaration made by the individual that the information provided to me for the preparation of this statement is true and correct
- I am authorised by the individual to give the information in this form to the Australian Taxation Office.

#### Signature

Saw Greco & Co

Date

Month

2023

Tax agent number (if applicable)

7 4 8 5 6

0 0 4

Name of organisation (if applicable)

SAM GRECO & CO

#### **Agent or Authorised Officer name**

Other Family name

GRECO

First given name

Other given names

SAM

Agent or Authorised Officer phone number (include area code)

0	7	3	2	6	3	5	2	0	0
	1 - 1	-		1 – 1		ı – ı		1 - 1	1

#### Agent or Authorised Officer address

Street address

LEVEL 1 MITCHAM HOUSE 1355 GYMPIE ROAD

Suburb/town/locality

**ASPLEY** 

State/territory

Q||L||D(Australia only) Postcode 4 || 0 || 3 || 4

(Australia only)

## **Lodging your form**

Post or fax your completed and signed form to:

- fax on 1300 139 024
- mail to

Australian Taxation Office PO Box 3578 **ALBURY NSW 2640** 

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## **Signature Certificate**

Reference number: 4EYHF-TUPHT-RKNEG-PB2PK

Signer Timestamp Signature

Sam Greco & Co

Email: samg@taxonline.com.au

 Sent:
 26 Oct 2023 00:15:47 UTC

 Viewed:
 26 Oct 2023 04:34:26 UTC

 Signed:
 26 Oct 2023 04:35:49 UTC

**Recipient Verification:** 

✓ Email verified 26 Oct 2023 04:34:26 UTC

IP address: 14.201.8.205

Location: Brisbane, Australia

Saw Greco & Co

John Larder

Email: johnlarder@live.com.au

 Sent:
 26 Oct 2023 00:15:47 UTC

 Viewed:
 26 Oct 2023 06:15:16 UTC

 Signed:
 26 Oct 2023 06:20:21 UTC

**Recipient Verification:** 

✓ Email verified 26 Oct 2023 06:15:16 UTC

John Larder

IP address: 101.188.172.120 Location: Brisbane, Australia

Document completed by all parties on:

26 Oct 2023 06:20:21 UTC

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