Australian Government Australian Taxation Office

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.

Section A: Your details

1 Tax file number	(TFN)	487164912
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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 **ato.gov.au/privacy**

2 Full name

Title: Mr	Mrs 🗙 N	1iss Ms	Other]	
Family name							
LARDER							
First given name				_	Other given names		
DONNA							
	Day	Month	Year				

		Day	IVIONIIN	rear
3	Date of birth	1 6 /	08/	1 9 6 3

4 Current postal address

Street address 10 EDEN DRIVE		
Suburb/town/locality EATONS HILL	State/territory	Postcode 4 0 3 7 (Australia only)
Daytime phone number (include area code)	(Additional of hy)	(Addition of the

Section 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

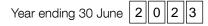
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JOHN & DONNA LARDER SUPERANNUATION FUND

Document Ref: 4EYHF-TUPHT-RKNEG-PB2PK

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 <u>made</u> to the SMSF but not allocated to you:



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:



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.

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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) DONNA LARDER

Signature

Douua Larder

Date	
Day	Month
26-1	0-2023

Day	Month	Year
26	-1/0-2023 /	

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	Day Month 26-10/2023	Year
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		
Title: Mr 🗙 Mrs Miss Ms Other		
Family name		
GRECO		
First given name Other given names		
SAM		
Agent or Authorised Officer phone number (include area code) 0732	635200	
Agent or Authorised Officer address		
Street address		
LEVEL 1 MITCHAM HOUSE 1355 GYMPIE ROAD		
Suburb/town/locality	State/territory	Postcode
ASPLEY	(Australia only)	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

Signature Certificate

Reference number: 4EYHF-TUPHT-RKNEG-PB2PK

Sigr	ner
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Timestamp

Sam Greco & Co Email: samg@taxonline.com.au

Sent: Viewed: Signed: 26 Oct 2023 00:15:47 UTC 26 Oct 2023 04:34:26 UTC 26 Oct 2023 04:35:49 UTC

Recipient Verification:

Email verified

26 Oct 2023 04:34:26 UTC

Donna Larder

Email: lardersrule@hotmail.com

Sent: Viewed: Signed: 26 Oct 2023 00:15:47 UTC 26 Oct 2023 06:21:22 UTC 26 Oct 2023 06:22:13 UTC

26 Oct 2023 06:21:22 UTC

Recipient Verification:

Document completed by all parties on: 26 Oct 2023 06:22:13 UTC

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Douna Larder

Sam Greco & Co

IP address: 101.188.172.120 Location: Brisbane, Australia

IP address: 14.201.8.205

Location: Brisbane, Australia

Signature

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