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THE TRUSTEE FOR WENDON FUND
43 JEPSON ST
MANGO HILL QLD 4509Our Reference: SMSF/Lodgment 2023
Phone: 13 28 69
Client ID: 79 268 070 922

30 November 2023

You need to lodge your SMSF annual return soon

Dear Trustee,

Your self-managed superannuation fund (SMSF) annual return for the financial year ended 30 June 2023 is due by **28 February 2024**.

We have information showing your self-managed superannuation fund (SMSF) received a rollover of your superannuation benefits following its establishment. This means your fund has legally operated in its first year and you need to lodge.

What you need to do to lodge on time

You'll need to:

- › prepare your funds accounts and statements
- › appoint an independent SMSF auditor to audit the SMSF **45 days** before lodgment; and
- › then lodge your (SMSF) annual return for the financial year ended 30 June 2023 by **28 February 2024**.

If you need assistance with performing these tasks you should engage a registered tax practitioner if you do not already have one.

If you need further time to lodge, you or your registered tax practitioner can request a deferral by the due date.

If you can't lodge because of a problem, we want you to tell us about it through our SMSF early engagement and voluntary disclosure service.

To access information about this service and how we can help you, visit our website ato.gov.au and search for 'SMSF Early Engagement Voluntary Service'.

If you've recently lodged, you don't need to do anything else.

What happens if you don't lodge?

We'll be monitoring the lodgment of your SMSF Annual Return to ensure you lodge on time.

If you don't meet your regulatory obligation to lodge, we'll remove the details of your fund from superfundlookup.gov.au which means that your SMSF won't be able to receive rollovers from other super funds or super guarantee payments from employers.

NEED HELP?

If you need help lodging your return or need to request a deferral, you can phone us on **13 28 66** between 8:00 am and 6:00 pm, Monday to Friday or visit ato.gov.au/SMSFadmin

If you have any questions about your SMSF, you can phone us on **13 10 20** between 8:00 am and 6:00 pm, Monday to Friday.

It will help if you have your Australian business number or tax file number with you when you phone.

We're committed to supporting people through difficult times. If you're struggling to meet your tax and super obligations visit ato.gov.au/support

MORE INFORMATION

Professional advice

You may also want to contact a tax professional to get professional advice.

For information about our commitments to you and what we ask of you, go to ato.gov.au/atocharter

We may also take compliance action which can include disqualifying you from acting as a trustee and cancelling your SMSF's registration. Your disqualification will be on the public record.

If you've accessed your super before you were legally entitled to do so, you are required to pay tax, penalties and interest on any amounts you have withdrawn from your SMSF.

Yours faithfully,

Emma Rosenzweig

Deputy Commissioner of Taxation