## Signature as prescribed in tax return

Self-managed superannuation fund annual return	2022
fund annual return	2023

Who should complete this annual return?	To complete this annual return				
Only self-managed superannuation funds (SMSFs) can complete this annual return. All other funds must complete the <i>Fund</i>	<ul> <li>Print clearly, using a BLACK pen only.</li> <li>Use BLOCK LETTERS and print one character per box.</li> </ul>				
income tax return <b>2023</b> (NAT 71287).					
The Self-managed superannuation fund annual return	$\blacksquare Place [X] in ALL applicable boxes.$				
<i>instructions</i> <b>2023</b> (NAT 71606) (the instructions) can assist you to complete this annual return.					
	Postal address for annual returns:				
The SMSF annual return cannot be used to notify us of a change in fund membership. You must update fund details	Australian Taxation Office				
via ABR.gov.au or complete the Change of details for superannuation entities form (NAT 3036).	GPO Box 9845 [insert the name and postcode				
superaining don entries form (revereeoo).	of your capital city]				
	For example; Australian Taxation Office				
	GPO Box 9845 SYDNEY NSW 2001				
	STDNET NSW 2001				
Section A: Fund information					
1 Tax file number (TFN) 896186665	To assist processing, write the fund's TFN at the top of pages 3, 5, 7, 9 and 11.				
The ATO is authorised by law to request your TFN. You are not obliged to quote your TFN but not quoting it could increase					
the chance of delay or error in processing your annual retu	irn. See the Privacy note in the Declaration.				
2 Name of self-managed superannuation fund (SMSF	5				
Name of self-managed superannuation fund (SMSF) The Lyon Superannuation Fund					
<b>3 Australian business number (ABN)</b> (if applicable) 665	54214423				
4 Current postal address					
40 Hardinge Street					
Suburb/town	State/territory Postcode				
Beaumaris	VIC 3193				
5 Annual return status					
Is this an amendment to the SMSF's 2023 return?	A No 🗙 Yes 🔄				

Is this the first required return for a newly registered SMSF?

**B** No X Yes

## 6 SMSF auditor

Auditor's name	
Title: Mr Mrs Miss Ms Other	
Family name	
Boys	
First given name Other given names	
Tony	
SMSF Auditor Number Auditor's phone number	
100014140 0410712708	
Postal address	
Box 3376	
Suburb/town State/territory Po	ostcode
Rundle Mall SA	5000
Date audit was completed A A A A A A A A A A A A A A A A A A A	
Was Part A of the audit report qualified?     B     No     X     Yes	
Was Part B of the audit report qualified?   C   No   X   Yes	
If Part B of the audit report was qualified, have the reported issues been rectified? D No Yes	

### 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	062922	Fund account number	10122230
Fund account name			
Lyon SuperFund			

I would like my tax refunds made to this account.  $\mathbf{X}$  Go to C.

### 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 name

Account number

## C Electronic service address alias

Provide the electronic service address alias (ESA) issued by your SMSF messaging provider. (For example, SMSFdataESAAlias). See instructions for more information.

Sig	nature as prescribed in tax return Tax File Number 896186665
8	Status of SMSF Australian superannuation fund A No Yes X Fund benefit structure B A Code
	Does the fund trust deed allow acceptance of the Government's Super Co-contribution and Low Income Super Amounts?
9	Was the fund wound up during the income year?         No X Yes )       If yes, provide the date on which the fund was wound up )       Day       Month       Year       Have all tax lodgment and payment obligations been met?       No .       Yes .
10	<b>Exempt current pension income</b> Did the fund pay retirement phase superannuation income stream benefits to one or more members 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.
	No X Go to Section B: Income.
	Yes Exempt current pension income amount A \$
	Which method did you use to calculate your exempt current pension income?
	Segregated assets method B
	Unsegregated assets method <b>C</b> ) Was an actuarial certificate obtained? <b>D</b> Yes
	Did the fund have any other income that was assessable?
	E Yes O Go to Section B: Income.
	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 <b>not</b> complete Section B: Income.)
	If you are entitled to claim any tax offsets, you can list these at Section D: Income tax calculation statement.

			7	
Signature as prescribed in	tax return		Tax File Number	896186665
Section B: Inco	ome			
the retirement phase for the	entire year, there was no	o other income that s, you can record t If the	F were supporting superannu was assessable, and you <b>ha</b> hese at Section D: Income ta total capital loss or total capita	ave not realised a deferred ax calculation statement. al gain is greater than
Did you have a capit (CGT) event durir		Yes 2017	100 or you elected to use the t and the deferred notional gain elete and attach a <i>Capital gain</i>	n has been realised,
Have you exemption	or rollover? M No X	Yes		
	Net	capital gain A	6	
Gross rer	nt and other leasing and h	iring income <b>B</b>	6	
	G	ross interest CS	6	288
	Forestry managed sch	d investment eme income <b>X</b> S	5	
Gross foreign inc				Loss
D1 \$	Net for	eign income DS	6	
Australian franking	credits from a New Zealar	nd company E	6	Number
		ansfers from oreign funds	6	Number
		nents where I not guoted	5	
Calculation of assessable Assessable employer co	contributions Gross	s distribution	6	
R1 \$		partnerships		2,563
plus Assessable personal co		amount		
R2 \$		amount 🖪		78,431
R3 \$		end franking credit	6	33,613 Code
(an amount must be include		*Gross trust distributions <b>M</b> \$	5	
less Transfer of liability to life company or PS		Assessable ontributions (R1 plus R2 us R3 less R6)	\$	
Calculation of non-arm's le	-			Code
*Net non-arm's length private co	*C	other income S	6	
plus *Net non-arm's length trus	t distributions due to a	able income changed tax <b>T</b> (	6	
U2 \$		tatus of fund		
plus *Net other non-arm's ler	len	t non-arm's gth income 45% tax rate) s U2 plus U3	6	
#This is a mandatory label.		SS INCOME abels A to U) W S	\$	Loss
*If an amount is entered at this label,	Exempt current pen	sion income	8	
check the instructions to ensure the correct tax treatment has been applied.	TOTAL ASSESSAE INCOME (W les			Loss 114,895

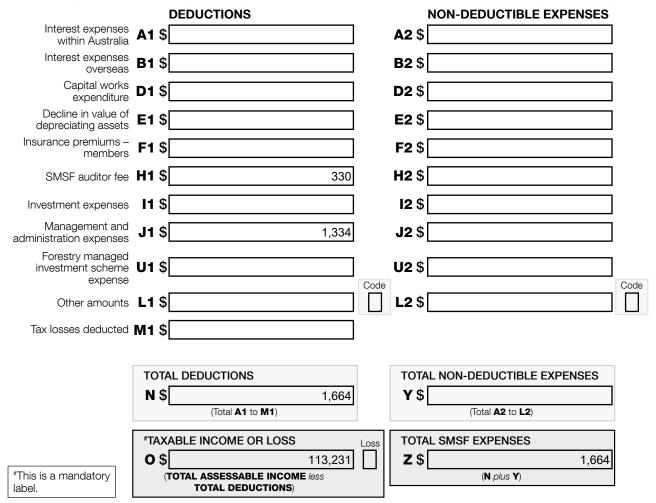
Page 4

Tax File Number 896186665

## Section C: Deductions and non-deductible expenses

## 12 Deductions and non-deductible expenses

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).

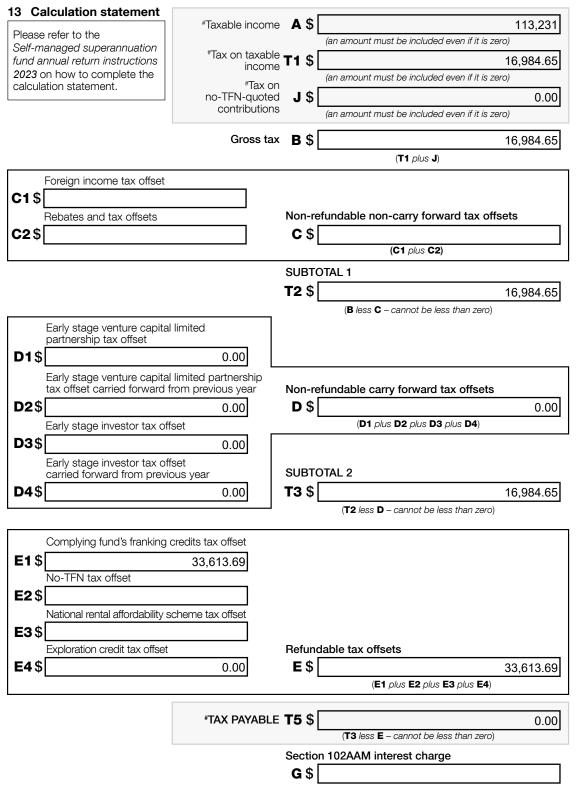


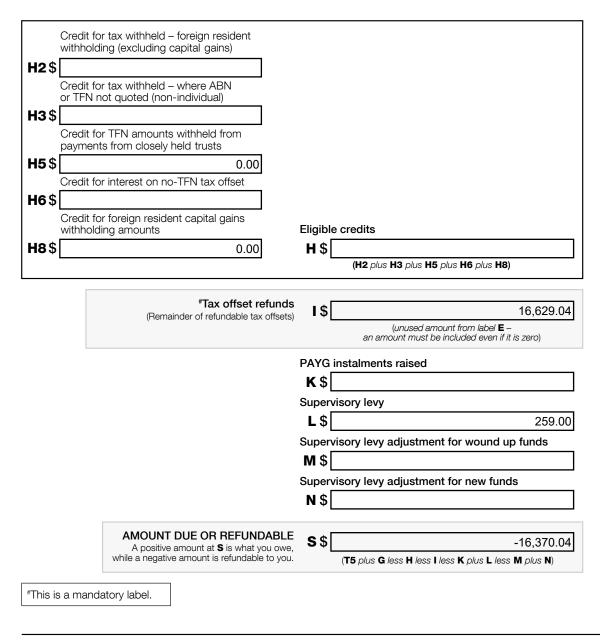
Tax File Number 896186665

## 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.

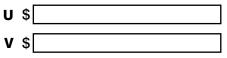




# Section E: Losses

## 14 Losses

If total loss is greater than \$100,000, complete and attach a Losses schedule 2023. Tax losses carried forward to later income years Net capital losses carried forward to later income years



Tax File Number 896186665

Section F:	Member information	on	
MEMBER 1			
Title: Mr 🗙 Mrs 🗌 I	Miss Ms Other		
Family name			
Lyon			
First given name	Othe	ər given	names
John	Ch	ricton	
Member's TFN	the Declaration 320217975		Day         Month         Year           Date of birth         26/06/1953
See the Privacy note in t	the Declaration. [520217975		Date of birth20/00/1933
Contributions	OPENING ACCOUNT BALANCE	\$	1,750,418.94
Befer to instructio	ns for completing these labels.		Proceeds from primary residence disposal
-		н	\$
Employer contr	ibutions		Day Month Year
Α Φ ABN of principa		н	1 Receipt date     /     /
A1		I	Assessable foreign superannuation fund amount
Personal contri	butions	•	Non-assessable foreign superannuation fund amount
В\$		J	
CGT small busi	iness retirement exemption		Transfer from reserve: assessable amount
C \$		Κ	\$
	iness 15-year exemption amount		Transfer from reserve: non-assessable amount
D \$		L	\$
Personal injury	election		Contributions from non-complying funds and previously non-complying funds
	ild contributions	т	
F \$			Any other contributions
Other third part	y contributions		(including Super Co-contributions and Low Income Super Amounts)
G \$		Μ	\$
			•
	TOTAL CONTRIBUTIONS	5 <b>N</b>	(Sum of labels A to M)
Other transactions		0	
		Ŭ	Inward rollovers and transfers
	phase account balance	Р	
S1 \$	1,944,465.28		Outward rollovers and transfers
Retirement pha – Non CDBIS	ise account balance	Q	\$
S2 \$			Lump Sum payments Code
Retirement pha	use account balance	R1	\$ 38,500.00 A
- CDBIS			Income stream payments Code
S3 \$	0.00	<b>R2</b>	\$
0 TRIS Count		S	\$ 1,944,465.28 ( <b>S1</b> plus <b>S2</b> plus <b>S3</b> )
	Accumulation phase value	• X1	\$
	Retirement phase value	• X2	\$
	Outstanding limited recourse borrowing arrangement amoun	v	

Sigi	nature as prescribed in tax return				Tax File Number	896186665
	Section H: Assets and	liabilities				
	ASSETS		•	¢	r	
a	Australian managed investments	Listed trusts	A	Φ		
		Unlisted trusts	В	\$		
		Insurance policy	С	\$		
		Other managed investments	D	\$		
b	Australian direct investments	Cash and term deposits	E	\$		42,583
	Limited recourse borrowing arranger	nents Debt securities	F	\$		
	Australian residential real property	Loans				
	J1 \$ Australian non-residential real property	———————————————————————————————————————				
	J2 \$	Listed shares	н	\$		1,884,972
	Overseas real property	Unlisted shares	I	\$		
	J3 \$	Limited recourse		\$		
	Australian shares	borrowing arrangements		φ		
	J4 \$	Non-residential real property	Κ	\$		
	Overseas shares	Residential	L	\$		
	Other	real property Collectables and	м			
	J6 \$	personal use assets				
	Property count	Other assets	0	\$		16,909
	J7					
с	Other investments	Crypto-Currency	N	\$		
d	Overseas direct investments	Overseas shares	Ρ	\$		
	Overse	as non-residential real property	Q	\$		
	Ov	verseas residential real property	R	\$		
	C	verseas managed investments	S	\$		
	-	-				
		Other overseas assets	_	Φ		
		N AND OVERSEAS ASSETS of labels <b>A</b> to <b>T</b> )	U	\$		1,944,464
ə	In-house assets Did the fund have a loan to, lea or investment in, related pa			\$		
	(known as in-house as at the end of the income	ssets)				

Signature as prescribed in tax return       Tax File Number       896186665         15f       Limited recourse borrowing arrangements If the fund had an LRBA were the LRBA borrowings from a licensed financial institution?       A No       Yes         Did the members or related parties of the       H       H       H	
If the fund had an LRBA were the LRBA borrowings from a licensed financial institution? Yes Did the members or related parties of the	
If the fund had an LRBA were the LRBA borrowings from a licensed financial institution? Yes Did the members or related parties of the	
If the fund had an LRBA were the LRBA borrowings from a licensed financial institution? Yes Did the members or related parties of the	
borrowings from a licensed <b>A No Yes</b> financial institution? Did the members or related parties of the	
fund use personal guarantees or other <b>B</b> No Yes security for the LRBA?	
16 LIABILITIES	
Borrowings for limited recourse borrowing arrangements	
V1 \$	
Permissible temporary borrowings	
V2 \$	
Other borrowings	
V3 \$ Borrowings V \$	
Total member closing account balances	
(total of all CLOSING ACCOUNT BALANCEs from Sections F and G)	
Reserve accounts X \$	
Other liabilities Y\$	
TOTAL LIABILITIES Z \$ 1,944,464	

# Section I: Taxation of financial arrangements 17 Taxation of financial arrangements (TOFA) Total TOFA gains H \$ Total TOFA losses I \$ Section J: Other information Family trust election status

A		If the trust or fund has made, or is making, a family trust election, write the f <b>specified</b> of the election (for example, for the 2022–23 inco
в 🗌	ation, 2 <b>023</b> .	If revoking or varying a family trust election, print <b>R</b> for revoke and complete and attach the <i>Family trust election, revoca</i>
		Interposed entity election status If the trust or fund has an existing election, write the earliest income year or fund is making and or more elections this year write the earliest
с	ction.	or fund is making one or more elections this year, write the earl specified and complete an <i>Interposed entity election or revocation</i> :
D 🗌	iplete 2023.	If revoking an interposed entity election, and attach the <i>Interposed entity electio</i>

## 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 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 contact details:	
Title: Mr X Mrs Miss Ms Other	
Family name	
Lyon	
First given name Other given names	
John Chricton	
Phone number 0401718881 Email address	
Non-individual trustee name (if applicable)	
ABN of non-individual trustee	Hrs
provide on this annual return to maintain the integrity of the register. For further information	
TAX AGENT'S DECLARATION: I declare that the <i>Self-managed superannuation fund annual return 2023</i> has been prepare provided by the trustees, that the trustees have given me a declaration stating that the info correct, and that the trustees have authorised me to lodge this annual return. Tax agent's signature	
	Day         Month         Year           Date         13         /         09         /         2023
Tax agent's contact details	
Title: Mr X Mrs Miss Ms Other	
Family name	
Morrison	
First given name Other given names	
Angus	
Tax agent's practice	
Morrison, Angus	
Tax agent's phone number Reference number	Tax agent number
0395846422 THELYONS0432	24756885