

Fleay Lines Superannuation Fund											
70078.71	30/06/2021	Pension			Accumulation			Accumulation			Total
		Undeducted	Taxed	Age: 63	Undeducted	Taxed	Age: 56	Undeducted	Taxed	Age: 63	
Opening Balance		470,078.71	526,356.78	996,435.49	511,041.70	487,731.30	998,773.00	0.00	0.00	0.00	1,995,208.49
Income/ Earnings		4,205.76	4,736.97	8,942.73	0.00	8,963.71	8,963.71	0.00	0.00	0.00	17,906.44
Pension		-11,287.20	-12,712.80	-24,000.00	0.00	0.00	0.00	0.00	0.00	0.00	-24,000.00
Income for the year (*apportioned to opening balances)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contributions		0.00	0.00	0.00	0.00	22,252.67	22,252.67	7,000.00	0.00	7,000.00	29,252.67
Tax on Income		-7,081.44	-7,975.83	-15,057.27	0.00	31,216.38	31,216.38	7,000.00	0.00	7,000.00	5,252.67
Tax on Contributions		0.00	0.00	0.00	0.00	1,418.25	1,418.25	0.00	0.00	0.00	1,418.25
Net Increase/(Decrease) for year		0.00	0.00	0.00	0.00	3,337.95	3,337.95	0.00	0.00	0.00	3,337.95
Closing Balance		0.00	0.00	0.00	0.00	4,756.20	4,756.20	0.00	0.00	0.00	4,756.20
		-7,081.44	-7,975.83	-15,057.27	0.00	26,460.18	26,460.18	7,000.00	0.00	7,000.00	496.47
		<b>462,997.27</b>	<b>518,380.95</b>	<b>981,378.22</b>	<b>511,041.70</b>	<b>514,191.48</b>	<b>1,025,233.18</b>	<b>7,000.00</b>	<b>0.00</b>	<b>7,000.00</b>	<b>1,995,704.96</b>
Tax Free			<b>47.03%</b>								
4% 20/21 Minimum Pension				\$ 39,900							
2% 20/21 Reduced Minimum				\$ 19,950							
20/21 Pension Taken				\$ 24,000							
4% 21/22 Minimum Pension				\$ 39,300							
2% 21/22 Reduced Minimum				\$ 19,650							
Closing Balance		From 01/07/2019 Steven has ceased work his pension will become a full allocated pension.									
Super Transfer Balance											
1/07/2019 Purchase				\$ 544,708.47							
6/09/2019 Purchase				\$ 500,000.00							
				\$ 1,044,708.47							
Unused Super Transfer Balance											
30/06/2021 Max \$1.6m				555,291.53							
1/07/2021 Unused Cap %				34.70%							
1/07/2021 34.70% x \$100K				34,700.00							
				589,991.53							



# Notice of intent to claim or vary a deduction for personal super contributions

## COMPLETING THIS STATEMENT

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.
- Place  in ALL applicable boxes.

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

## Section A: Your details

### 1 Tax file number (TFN)

155 060 295

**!** The ATO does not collect this information provided on this form. This form is to assist you in providing details to your super fund. Your super fund is authorised to request your personal details, including your TFN, under the *Superannuation Industry (Supervision) Act 1993*, the *Income Tax Assessment Act 1997* and the *Taxation Administration Act 1953*. It is not an offence not to provide your TFN. However, if you do not provide your TFN, and your super fund doesn't already hold your TFN, they will not be permitted to accept the contribution(s) covered by this notice. For more information about your privacy please contact the entity you are providing this form to.

### 2 Name

Title: Mr  Mrs  Miss  Ms  Other

Family name  
FLEAY

First given name: ROSLYN Other given names: JUDITH

3 Date of birth: Day 27 / Month 08 / Year 1964

### 4 Current postal address

125 AYRES ROAD

Suburb/town/locality: HEALESVILLE State/territory: VIC Postcode: 3777

Country if outside of Australia

5 Daytime phone number (include area code) 0397376292

## Section B: Super fund's details

### 6 Fund name

FLEAY LINES SUPERANNUATION FUND

7 Fund Australian business number (ABN) 82 240 879 488

8 Member account number

9 Unique Superannuation Identifier (USI) (if known)

## Section C: Contribution details

### 10 Personal contribution details

Is this notice varying an earlier notice? No  Yes

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.  
If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

#### ORIGINAL NOTICE TO CLAIM A TAX DEDUCTION

11 Financial year ended 30 June 20

12 My personal contributions to this fund in the above financial year \$

13 The amount of these personal contributions I will be claiming as a tax deduction \$

## Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

### INTENTION TO CLAIM A TAX DEDUCTION

**!** Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

*I declare that at the time of lodging this notice:*

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included any of the contributions in an earlier valid notice.


*I declare that I am lodging this notice at the earlier of either:*

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, **or**
- before the end of the income year following the year in which the contribution was made.

*I declare that the information given on this notice is correct and complete.*

Name (Print in BLOCK LETTERS)

Signature



Date

Day / Month / Year  
 /  /

**>** Send your completed notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

### VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20

15 My personal contributions to this fund in the above financial year \$  ,  .

16 The amount of these personal contributions claimed in my original notice of intent \$  ,  .

17 The amount of these personal contributions I will now be claiming as a tax deduction \$  ,  .