



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

1-1

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)

201 612 183

! 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
CORAM

First given name
REBECCA

Other given names
LEE

3 Date of birth 29 / 05 / 1978

4 Current postal address

SILSHOREBIRD PARADE

Suburb/town/locality
GREENHILLS

State/territory
NSW

Postcode
2230

5 Daytime phone number (include area code) 0405923030

Section B: Super fund's details

6 Fund name

SW + R C SUPER FUND

7 Fund Australian business number (ABN) 34 568 069 810

8 Member account number CORREB00001A

9 Unique Superannuation Identifier (USI) (if known)

1-2

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

1 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
 / /

2 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 \$, .

SW & RC Super Fund
Deductions Notice Letter



I, Rebecca Lee Coram as a member of SW & RC Super Fund

have requested in writing in accordance with section 290-170 of the Income Tax Assessment Act 1997 the intention to claim a tax deduction of

\$84500.00

for contributions paid in the year ended 30 June 2022.

DocuSigned by:

Rebecca Coram

0C186DAAB01840B...

Rebecca Lee Coram

Date: 30/06/2022

SW & RC Super Fund Deductions Notice Letter



Hemi Hohepa Pty Ltd as trustee for SW & RC Super Fund acknowledges that

Rebecca Lee Coram

has advised in writing in accordance with Section 290-170 of the Income Tax Assessment Act 1997 the intention to claim a tax deduction of

\$84500.00

for contributions paid in the year ended 30 June 2022. The Trustee has taken action to deduct the appropriate level of tax from the contributions claimed.

DocuSigned by:
Rebecca Coram
OC186DAAB016408...

Rebecca Lee Coram

Date: 30/06/2022

**** IMPORTANT INFORMATION - PLEASE READ THE FOLLOWING CAREFULLY ****

If your records confirm the above amount claimed no action on your behalf is required. Retain this acknowledgement with your taxation records as it may be requested by the Australian Taxation Office to substantiate your tax deduction for Superannuation Contributions.

Otherwise: Complete the details below and return this form to the Trustee if:

1. The amount shown above is not the amount that will be claimed, or
2. The Australian Taxation Office disallows/reduces the amount you claim.

In terms of Section 290-170 of the Income Tax Assessment Act 1997 I advise that the amount I intend to claim as a tax deduction for the period 30 March 2022 to 30 June 2022 is: \$ _____

Rebecca Lee Coram

Date: 30/06/2022

Apply for a payment



Please complete in pen using CAPITAL letters and print to mark boxes. Read the Privacy Collection Statement on page 2 to see how AustralianSuper uses your personal information.

STEP 1. PROVIDE YOUR PERSONAL DETAILS

Last name

C O R A M

Mr Ms Mrs Miss Dr

First name

R E B E C C A

Date of birth

12 18 10 15 1 9 7 8

Male Female

Tax File Number (TFN)

2 0 1 6 1 2 1 8 3

Member number

3 2 7 9 2 2 6 1

! For how we use your TFN, go to australiansuper.com/RefTFN. If you don't provide your TFN you're likely to pay more tax than you need to.

Street address

2 2 1 1 T A R O M E O C O U R T

Suburb

H O P E I S L A N D

State

Q L D

Postcode

4 2 1 1

Previous street address (if applicable)

5 1 S H O R E B I R D P A R A D E

Suburb

G R E E N H I L L S B E A C H

State

N S W

Postcode

2 2 3 0

Postal address (if different)

Suburb

State

Postcode

Telephone (business hours)

Telephone (after hours)

Mobile

0 4 0 5 9 2 3 0 3 0

Email

rebecca@hyve.com.au

Name of the last employer contributing into AustralianSuper for you

ANDREW HERCUS

I am an Australian or New Zealand citizen or permanent resident.

STEP 2. CONFIRM YOU'RE ELIGIBLE FOR A PAYMENT

From the six options select the statement that applies to you: (choose (x) one option only)

I am aged 65 or over

I am aged 60 to 64 and have changed jobs since turning 60
My previous employer was

I stopped working there on

I am between my preservation age and the age of 64, have ceased gainful employment and don't plan to work more than 10 hours a week again

I have unrestricted non-preserved super

I have \$200 or less in my account (conditions apply)

I want to make a transfer into another super fund or self-managed super fund (SMSF)

STEP 3. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the options below.

- Option 1 – I authorise AustralianSuper to give my TFN (provided in Step 1) to my other super fund or SMSF.**
This option is only available if you're transferring funds across to another super fund. Your other super fund will use it to confirm your ID with the Australian Taxation Office.
- Option 2 – I want to use electronic verification.**
By giving you my Medicare, driver's licence or Australian passport details below, I authorise the use of my personal details on this form for the purpose of electronic data verification. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

Any TWO of the following:

1. Full name as appears on my Medicare card

My Medicare number is

Valid to

My reference number
on this card is

2. Full name as appears on my driver's licence

Licence number

State of issue

Expiry date

3. My Australian passport number is

Place of birth (as shown on your passport)

Country of birth (not shown on your passport)

Family name at birth (not shown on your passport)

- Option 3 – I want to attach paper copies of certified documentation**
I have attached certified copies of my proof of identity to this form. Please ensure that you provide photocopies of your original identification documents and that they are correctly certified. Each page must be certified as a true copy. The documents we receive from you must have been certified and dated within the last 6 months. Undated documents will be rejected. For instructions on who can certify documents, go to australiansuper.com/IDHelp

! See page 2 of this form to check "How to certify your documents".

- Electronic verification if the paper copies of my proof of identity documents are incorrectly certified or can't be read**
I authorise the use of my personal details for the purpose of electronic data verification if the paper copies of my certified documentation are incorrectly certified or unable to be read. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

STEP 4. ARE YOU WITHDRAWING YOUR WHOLE ACCOUNT BALANCE?

- Yes** – This will close your account and any insurance cover will end. Investment earnings*, tax and insurance and management costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you complete this form. Choose (X) one of the two options below:
- Transfer all of my account to another super fund or SMSF
- Withdraw some of my account in cash and transfer the rest to another super fund or SMSF
- Amount to withdraw \$
- No** – Choose (X) one of the two options below:
(you need to leave at least \$6,000 in your account*)
- Transfer some of my account to another super fund or SMSF.
- Withdraw part of my account in cash.
Any tax payable will be deducted from this amount.
- Amount \$ 1 0 8 0 0 0
- Go to step 5.**

Go to step 6.

- * Investment earnings can be positive or negative.
* You'll need to ensure you have enough funds to pay insurance costs if you want to keep your insurance cover. AustralianSuper may also refuse all or part your request if your account balance will fall below \$6000. See the *Before applying for a payment* section on page 2.

STEP 5. CHOOSE THE INVESTMENT OPTION(S) FOR YOUR PAYMENT

Complete this section ONLY if you're invested in Pre-mixed and DIY option/s.

Write the percentage you want to withdraw from each investment option below. If you leave this blank, your withdrawal will be made from your selected future contribution investment choice/s. If you don't have enough money in one or more of your selected options, the balance of your withdrawal will be pro-rated in proportion to the balance in each option.

High Growth	%
Balanced	%
Socially Aware	%
Indexed Diversified	%
Conservative Balanced	%
Stable	%
Australian Shares	%
International Shares	%
Diversified Fixed Interest	%
Cash	%
Total must add up to 100%	1 0 0 %

Complete this section ONLY if you're invested in the Member Direct option

If you have super invested in AustralianSuper's Member Direct option, do you want to sell these holdings to make this withdrawal?

(Please choose (x) one option only)

Yes – I will sell my Member Direct holdings.

If you have a term deposit, you must be eligible to redeem it before it matures and early redemption costs will apply. Refer to the *Member Direct investment option* guide for full details.

No – I don't want to sell my Member Direct holdings.

You must maintain a minimum total account balance to continue using Member Direct. If your total super account balance falls below \$10,000, or your pension account balance falls below \$30,000, your Member Direct account may be closed.

STEP 6. PROVIDE TRANSFER AND/OR PAYMENT DETAILS

To transfer some or all of your account, provide details of your other super fund.

Fund name

Address

Suburb

State

Postcode

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Your other super fund member number

To transfer some or all of your account to your SMSF, provide the details.

SMSF name

SW & RC SUPER FUND

Australian Business Number (ABN)

3 4 5 6 8 0 6 9 8 1 0

Electronic Service Address (ESA)

BGLSF 360

SMSF bank details:

! Please attach a certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.

Account name

SW & RC SUPER FUND

BSB number

1 8 2 5 1 2

Account number

9 7 0 3 1 3 4 4 1

STEP 6. PROVIDE TRANSFER AND/OR PAYMENT DETAILS (CONTINUED)

To withdraw some or all of your account in cash, provide your bank account details below.

Account name – must be held in your name or jointly in your name Name of bank or financial institution

Branch

BSB number

Account number

STEP 7. BENEFIT PAYMENT CHECKLIST

- Have you checked you are eligible for payment or rollover?
- Have you completed Section 3 Provide proof of your identity?
- Are you claiming a tax deduction for any personal contributions? If so, refer to page 2 for more information.
- Are you transferring some or all of your benefit to an SMSF? If so, ensure Section 6 is completed and you've attached a certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.
- Have you completed all the required sections and signed this form?
- Have you considered where you want your future employer contributions paid? See further details below.

What happens to my future Employer contributions?

Using this form to transfer your benefits will **not** change the fund to which your employer pays your contributions, and will close the AustralianSuper account you are transferring your benefits from.

If AustralianSuper receives future employer contributions after your benefits are transferred out and your account is closed, a new account will be opened for you in AustralianSuper.

If you wish to change the fund into which your employer contributions are being paid, you will need to speak to your employer about super choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call the Australian Taxation Office (ATO) on 13 10 20.

STEP 8. SIGN THIS FORM

I have read the Privacy Collection Statement as set out on page 2 of this form, and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.

I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).

I understand that if AustralianSuper receives any contributions after my account has been closed a new account will be opened for me.

I understand that if I withdraw my whole account balance this will close my AustralianSuper account and any insurance cover will end. AustralianSuper will no longer have any responsibility for the account.

Sign here



Rebecca Lee Coram

Date

31 03 2022

Print full name

R E B E C C A L E E C O R A M

STEP 9. SEND THIS FORM TO US



Please send the completed form and certified copies of your ID (if you haven't opted for electronic verification at Step 3) to AustralianSuper, GPO Box 1901 MELBOURNE VIC 3001. Or upload scanned copies of your completed forms and certified identification via our website at australiansuper.com/email

If you're withdrawing more than \$10,000, you'll also need to provide copies of bills or bank statements as listed on page 2 under 'How to certify your documents'.



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)

3 9 2 3 4 4 4 2 6

! 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
WEIR

First given name: STEVEN
Other given names: JAMES

3 Date of birth Day: 28 / Month: 09 / Year: 1979

4 Current postal address

S I S H O R E B I R D P A R A D E

Suburb/town/locality: GREENHILLS
State/territory: NSW
Postcode: 2230

Country if outside of Australia:

5 Daytime phone number (include area code) 0404999050

Section B: Super fund's details

6 Fund name

S W I R C S U P E R F U N D

7 Fund Australian business number (ABN) 34 568 069 810

8 Member account number WEI STEE 00001A

9 Unique Superannuation Identifier (USI) (if known)

2.2

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.

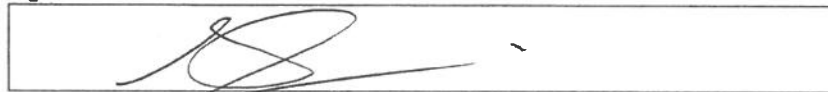
I declare that I am lodging this notice at the earlier of either:

- 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 \$

2-3

SW & RC Super Fund
Deductions Notice Letter




I, Steven James Weir as a member of SW & RC Super Fund

have requested in writing in accordance with section 290-170 of the Income Tax Assessment Act 1997 the intention to claim a tax deduction of

\$39861.00

for contributions paid in the year ended 30 June 2022.

DocuSigned by:

D1525F7948B8450...

Steven James Weir

Date: 30/06/2022

2.4

**SW & RC Super Fund
Deductions Notice Letter**



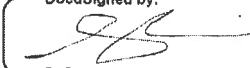
Hemi Hohepa Pty Ltd as trustee for SW & RC Super Fund acknowledges that

Steven James Weir

has advised in writing in accordance with Section 290-170 of the Income Tax Assessment Act 1997 the intention to claim a tax deduction of

\$39861.00

for contributions paid in the year ended 30 June 2022. The Trustee has taken action to deduct the appropriate level of tax from the contributions claimed.

DocuSigned by:

D1525F7948B8450...

Steven James Weir

Date: 30/06/2022

**** IMPORTANT INFORMATION - PLEASE READ THE FOLLOWING CAREFULLY ****

If your records confirm the above amount claimed no action on your behalf is required. Retain this acknowledgement with your taxation records as it may be requested by the Australian Taxation Office to substantiate your tax deduction for Superannuation Contributions.

Otherwise: Complete the details below and return this form to the Trustee if:

1. The amount shown above is not the amount that will be claimed, or
2. The Australian Taxation Office disallows/reduces the amount you claim.

In terms of Section 290-170 of the Income Tax Assessment Act 1997 I advise that the amount I intend to claim as a tax deduction for the period 30 March 2022 to 30 June 2022 is: \$ _____

Steven James Weir

Date: 30/06/2022

Apply for a payment



Please complete in pen using CAPITAL letters and print to mark boxes. Read the Privacy Collection Statement on page 2 to see how AustralianSuper uses your personal information.

STEP 1. PROVIDE YOUR PERSONAL DETAILS

Last name

W E I R

Mr Ms Mrs Miss Dr

First name

S T E V E N

Date of birth

12 18 10 18 1 9 7 9

Male Female

Tax File Number (TFN)

3 9 2 3 4 4 4 2 6

Member number

2 4 0 1 4 3 2 1

! For how we use your TFN, go to australiansuper.com/RefTFN. If you don't provide your TFN you're likely to pay more tax than you need to.

Street address

2 2 1 1 T A R O M E O C O U R T

Suburb

H O P E I S L A N D

State

Q L D

Postcode

4 2 1 2

Previous street address (if applicable)

Suburb

State

Postcode

Postal address (if different)

Suburb

State

Postcode

Telephone (business hours)

Telephone (after hours)

Mobile

0 4 0 4 9 9 9 0 5 0

Email

sj_weir@yahoo.com.au

Name of the last employer contributing into AustralianSuper for you

VALLANT AUSTRALIA PTY LTD

I am an Australian or New Zealand citizen or permanent resident.

STEP 2. CONFIRM YOU'RE ELIGIBLE FOR A PAYMENT

From the six options select the statement that applies to you: (choose one option only)

I am aged 65 or over

I am aged 60 to 64 and have changed jobs since turning 60
My previous employer was

I stopped working there on

I am between my preservation age and the age of 64, have ceased gainful employment and don't plan to work more than 10 hours a week again

I have unrestricted non-preserved super

I have \$200 or less in my account (conditions apply)

I want to make a transfer into another super fund or self-managed super fund (SMSF)

STEP 3. PROVIDE PROOF OF YOUR IDENTITY

Please complete (X) one of the options below.

- Option 1 – I authorise AustralianSuper to give my TFN (provided in Step 1) to my other super fund or SMSF.**
This option is only available if you're transferring funds across to another super fund. Your other super fund will use it to confirm your ID with the Australian Taxation Office.
- Option 2 – I want to use electronic verification.**
By giving you my Medicare, driver's licence or Australian passport details below, I authorise the use of my personal details on this form for the purpose of electronic data verification. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

Any TWO of the following:

1. Full name as appears on my Medicare card

My Medicare number is

Valid to

My reference number
on this card is

2. Full name as appears on my driver's licence

Licence number

State of issue

Expiry date


3. My Australian passport number is

Place of birth (as shown on your passport)

Country of birth (not shown on your passport)

Family name at birth (not shown on your passport)

- Option 3 – I want to attach paper copies of certified documentation**
I have attached certified copies of my proof of identity to this form. Please ensure that you provide photocopies of your original identification documents and that they are correctly certified. Each page must be certified as a true copy. The documents we receive from you must have been certified and dated within the last 6 months. Undated documents will be rejected. For instructions on who can certify documents, go to australiansuper.com/IDHelp

 See page 2 of this form to check "How to certify your documents".

- Electronic verification if the paper copies of my proof of identity documents are incorrectly certified or can't be read**
I authorise the use of my personal details for the purpose of electronic data verification if the paper copies of my certified documentation are incorrectly certified or unable to be read. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

STEP 4. ARE YOU WITHDRAWING YOUR WHOLE ACCOUNT BALANCE?

- Yes** – This will close your account and any insurance cover will end. Investment earnings*, tax and insurance and management costs will change the final amount paid. Please check with your employer that any final contributions have gone into your account before you complete this form. Choose (X) one of the two options below:
- Transfer all of my account to another super fund or SMSF
- Withdraw some of my account in cash and transfer the rest to another super fund or SMSF
- Amount to withdraw \$
- No** – Choose (X) one of the two options below:
(you need to leave at least \$6,000 in your account*)
- Transfer some of my account to another super fund or SMSF.
- Withdraw part of my account in cash.
Any tax payable will be deducted from this amount.
- Amount \$ 2 0 5 0 0 0

Go to step 5.

Go to step 6.

* Investment earnings can be positive or negative.

You'll need to ensure you have enough funds to pay insurance costs if you want to keep your insurance cover. AustralianSuper may also refuse all or part your request if your account balance will fall below \$6000. See the *Before applying for a payment* section on page 2.

STEP 5. CHOOSE THE INVESTMENT OPTION(S) FOR YOUR PAYMENT

Complete this section ONLY if you're invested in Pre-mixed and DIY option/s.

Write the percentage you want to withdraw from each investment option below. If you leave this blank, your withdrawal will be made from your selected future contribution investment choice/s. If you don't have enough money in one or more of your selected options, the balance of your withdrawal will be pro-rated in proportion to the balance in each option.

High Growth	%
Balanced	%
Socially Aware	%
Indexed Diversified	%
Conservative Balanced	%
Stable	%
Australian Shares	%
International Shares	%
Diversified Fixed Interest	%
Cash	%
Total must add up to 100%	1 0 0 %

Complete this section ONLY if you're invested in the Member Direct option

If you have super invested in AustralianSuper's Member Direct option, do you want to sell these holdings to make this withdrawal?

(Please choose (X) one option only)

Yes – I will sell my Member Direct holdings.

If you have a term deposit, you must be eligible to redeem it before it matures and early redemption costs will apply. Refer to the *Member Direct investment option* guide for full details.

No – I don't want to sell my Member Direct holdings.

You must maintain a minimum total account balance to continue using Member Direct. If your total super account balance falls below \$10,000, or your pension account balance falls below \$30,000, your Member Direct account may be closed.

STEP 6. PROVIDE TRANSFER AND/OR PAYMENT DETAILS

To transfer some or all of your account, provide details of your other super fund.

Fund name

Address

Suburb

State

Postcode

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Your other super fund member number

To transfer some or all of your account to your SMSF, provide the details.

SMSF name

SW & RC SUPER FUND

Australian Business Number (ABN)

3 4 5 6 8 0 6 9 8 1 0

Electronic Service Address (ESA)

BGLSF360

SMSF bank details:



Please attach a certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.

Account name

SW & RC SUPER FUND

BSB number

1 8 2 5 1 2

Account number

9 7 0 3 1 3 4 4 1

STEP 6. PROVIDE TRANSFER AND/OR PAYMENT DETAILS (CONTINUED)

To withdraw some or all of your account in cash, provide your bank account details below.

Account name – must be held in your name or jointly in your name Name of bank or financial institution

Branch

BSB number

Account number

STEP 7. BENEFIT PAYMENT CHECKLIST

- Have you checked you are eligible for payment or rollover?
- Have you completed Section 3 Provide proof of your identity?
- Are you claiming a tax deduction for any personal contributions? If so, refer to page 2 for more information.
- Are you transferring some or all of your benefit to an SMSF? If so, ensure Section 6 is completed and you've attached a certified copy of your SMSF bank statement that clearly displays the SMSF account name, BSB and account number.
- Have you completed all the required sections and signed this form?
- Have you considered where you want your future employer contributions paid? See further details below.

What happens to my future Employer contributions?

Using this form to transfer your benefits will **not** change the fund to which your employer pays your contributions, and will close the AustralianSuper account you are transferring your benefits from.

If AustralianSuper receives future employer contributions after your benefits are transferred out and your account is closed, a new account will be opened for you in AustralianSuper.

If you wish to change the fund into which your employer contributions are being paid, you will need to speak to your employer about super choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call the Australian Taxation Office (ATO) on 13 10 20.

STEP 8. SIGN THIS FORM

I have read the Privacy Collection Statement as set out on page 2 of this form, and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.

I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).

I understand that if AustralianSuper receives any contributions after my account has been closed a new account will be opened for me.

I understand that if I withdraw my whole account balance this will close my AustralianSuper account and any insurance cover will end. AustralianSuper will no longer have any responsibility for the account.

Sign here



Date

31 03 20 22

Print full name

S T E V E N J A M E S W E I R

STEP 9. SEND THIS FORM TO US



Please send the completed form and certified copies of your ID (if you haven't opted for electronic verification at Step 3) to AustralianSuper, GPO Box 1901 MELBOURNE VIC 3001. Or upload scanned copies of your completed forms and certified identification via our website at australiansuper.com/email

If you're withdrawing more than \$10,000, you'll also need to provide copies of bills or bank statements as listed on page 2 under 'How to certify your documents'

SW & RC Super Fund
SuperStream Rollover / Release Authority
As at 30 June 2022

3-1



1. Rollover / Release Authority Summary

Member's / Beneficiary's Name: Rebecca Lee Coram

Transaction Type: SuperStream Roll In

Date: 05/05/2022

Transaction Status: Roll In Transaction Received

2. Rollover / Release Authority Details

Member Details:

Is the rollover for a member or a beneficiary? Member

Member's Name: Rebecca Lee Coram

Member Account: Default accumulation account

TFN: *****183

Date of Birth: *****1978

Sex: Male

Address: 2211 Taromeo Court, HOPE ISLAND, 4212, QLD, AUSTRALIA

Service Period Start Date: 01/07/1996

Receiving Fund Details:

Is the fund an SMSF? Yes

Name: The Trustee for SW & RC Super Fund

ABN: 34568069810

ESA: BGLSF360

Member Client ID: UNKNOWN

Bank Account

BSB: 182512

Account Name: The Trustee for SW & RC Super Fu

Account Number: 970313441

Transferring Fund Details:

Is the fund an SMSF? No

Name: The Trustee for AUSTRALIANSUPER

ABN: 65714394898

ESA:

USI: STA0100AU

Member Client ID: 32792261

3.2

SW & RC Super Fund
SuperStream Rollover / Release Authority
As at 30 June 2022



Rollover Transaction Details:

Is the request for the entire balance? No

Payment Reference Number: 800000001649401464 ✓

Requested Amount: \$106,918.64 ✓

Rollover Components

Tax Free Component: \$16,947.83

Element Taxed In The Fund: \$89,970.81

Element Untaxed In The Fund: \$0.00

Kiwisaver Tax Free Component: \$0.00

Preservation Amounts

Preserved Amount: \$106,918.64

Restricted Non-Preserved: \$0.00

Unrestricted Non-Preserved: \$0.00

Kiwisaver Preserved Amount: \$0.00

Is the request a Death Benefit Rollover? No

3. SuperStream Rollover / Release Authority Transaction History

Date	Transaction Status	Transaction Source	Processed By
05/05/2022	Roll In Transaction Received	Electronically received (Fund)	SYSTEM

SW & RC Super Fund
SuperStream Rollover / Release Authority
As at 30 June 2022

4-1



1. Rollover / Release Authority Summary

Member's / Beneficiary's Name: Steven James Weir

Transaction Type: SuperStream Roll In

Date: 30/05/2022

Transaction Status: Roll In Transaction Received

2. Rollover / Release Authority Details

Member Details:

Is the rollover for a member or a beneficiary? Member

Member's Name: Steven James Weir

Member Account: Default accumulation account

TFN: *****426

Date of Birth: *****1979

Sex:

Address: 2211 Taromeo Court, HOPE ISLAND, 4212, QLD, AUSTRALIA

Service Period Start Date: 01/12/1998

Receiving Fund Details:

Is the fund an SMSF? Yes

Name: The Trustee for SW & RC Super Fund

ABN: 34568069810

ESA: BGLSF360

Member Client ID: UNKNOWN

Bank Account

BSB: 182512

Account Name: The Trustee for SW & RC Super Fu

Account Number: 970313441

Transferring Fund Details:

Is the fund an SMSF? No

Name: The Trustee for AUSTRALIANSUPER

ABN: 65714394898

ESA:

USI: STA0100AU

Member Client ID: 24014321

SW & RC Super Fund
SuperStream Rollover / Release Authority
As at 30 June 2022

42



Rollover Transaction Details:

Is the request for the entire balance? No

Payment Reference Number: 800000001663751758

Requested Amount: \$204,585.58

Rollover Components

Tax Free Component: \$0.00

Element Taxed In The Fund: \$204,585.58

Element Untaxed In The Fund: \$0.00

Kiwisaver Tax Free Component: \$0.00

Preservation Amounts

Preserved Amount: \$204,585.58

Restricted Non-Preserved: \$0.00

Unrestricted Non-Preserved: \$0.00

Kiwisaver Preserved Amount: \$0.00

Is the request a Death Benefit Rollover? No

3. SuperStream Rollover / Release Authority Transaction History

Date	Transaction Status	Transaction Source	Processed By
30/05/2022	Roll In Transaction Received	Electronically received (Fund)	SYSTEM

S-1

SW & RC Super Fund

Formation Costs SLA Invoice 31417

\$2,500.00 establishment costs

Year

2022	500.00	2,000.00
2023	500.00	1,500.00
2024	500.00	1,000.00
2025	500.00	500.00
2026	500.00	0.00



5-1

The Trustees
SW & RC Super Fund
2211 Taromeo Court
HOPE ISLAND QLD 4212

Tax Invoice
031417

Ref: WEIRSS1
30 March, 2022

Description	Amount
<p><u>SW & RC Super Fund</u></p> <ul style="list-style-type: none">• Meetings discussions and advice to you in relation to establishment of your Self Managed Superannuation Fund (SMSF).• Attending to the establishment of your SMSF including checking of all forms minutes trust deeds and other relevant trust documentation.• Provision of SMSF Trust Deed including alterations to reflect the SMSF has a corporate trustee;• a Product Disclosure Statement summarising the features of the SMSF;• Consents for the directors of the corporate Trustee;• Minutes to set up the SMSF;• Applications for the SMSF members;• ATO trustee declaration forms x 2;• Superstream registration;• Macquarie bank account application;• ABN & TFN applications; <p><u>Corporate Trustee - Hemi Hohepa Pty Ltd</u></p> <ul style="list-style-type: none">• Certificate of Registration of a company including ACN (Australian Company Number)• Provision of Company's Constitution including customisations to reflect that the company is the trustee of a superannuation fund;• Consent to act as Director;• Consent to act as Secretary;• Application for shares;• Minutes of a meeting of directors;• Share Certificates;• Consent to act as Public Officer;• Notice of appointment of Public Officer; <p style="text-align: right; font-size: 2em; font-family: cursive;">Pd 25/5/22</p>	<p style="text-align: right; vertical-align: bottom;">2,272.73</p>

Description	Amount

<p>Please note that this invoice is now due.</p>	<p style="text-align: right;">2,272.73 GST: \$ 227.27 Amount Due: \$ 2,500.00</p>
---	---

The firm reserves the right to charge interest of 11.5% compounding daily on outstanding amounts. The firm reserves the right to refer the outstanding invoices to a debt collection agency or legal practitioner, at a cost to the client. Such costs may include commission, administration fees, legal costs and interest as charged by the debt collection agency or legal practitioner.

<input type="checkbox"/> (EFT) - Transfer to our account Account Name Simmons Livingstone & Associates BSB: 064 445 Account: 1052 7520	Ref: WEIRSS1 Invoice: 031417 30 March, 2022 Amount Due: \$ 2,500.00
<input type="checkbox"/> Credit Card (Please indicate type) <input type="checkbox"/> Mastercard <input type="checkbox"/> Visa Card Number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Card CCV <input type="text"/> <input type="text"/> <input type="text"/>
Cardholder Signature Expiry/...../.....	

6-1



**Simmons
Livingstone
& Associates**

Hemi Hohepa Pty Ltd ATF
SW & RC Super Fund
2211 Taromeo Court
HOPE ISLAND QLD 4212

Simmons Livingstone & Associates
PO Box 806
Oxenford QLD 4210
Telephone: 07 5561 8800
Facsimile: 07 5561 8700
Email: admin@simmonslivingstone.com.au

TAX INVOICE

Tax Invoice Number :	73458001100
Date:	30 March 2022

Description	Amount
• General financial advice RE SW & RC Super Fund	\$2,272.73
• GST	\$227.27
Total Amount Due: (includes GST) Terms : 7 days	\$2,500.00

✂

Please detach and return with your payment or Credit Card authority to : Infocus Securities Australia Pty Ltd PO Box 806 Oxenford QLD 4210	Account: Mr S Weir and Mrs R Coram PE ID: 700108 Invoice: 73458001100 Due Date: 06 April 2022 Adviser: Samuel Young Amount Due: \$2,500.00
--	--

If paid by Credit Card, a 1.5% surcharge will apply and the invoice value will become \$2,537.50 (inc GST).
 Charge \$2,537.50 to my MasterCard VISA

Card No :

Cardholder Name : _____
 Expiry Date : ____/____/____ Signature of Cardholder : _____

Other Payment Methods: Direct Credit:
Account Name: Infocus Securities Australia Pty Ltd
Westpac BSB: 034-676
Account Number: 279166
Reference: Please include ID: 7001081100.
 (Please email accounts@infocus.com.au on the day you send your payment via direct credit to enable Infocus to correctly receipt the payment).
Cheque: Please make cheque payable to Infocus Securities Australia Pty Ltd

Office Use Only Authority Number: Date Received:	Infocus Securities Australia Pty Ltd ABN 47 097 797 049 AFSL and Australian Credit Licence No. 236523 trading as Infocus Wealth Management
---	--

7-1



Macquarie Cash Management Account

MACQUARIE BANK LIMITED
ABN 46 008 583 542 AFSL 237502

enquiries 1800 806 310
transact@macquarie.com
www.macquarie.com.au

GPO Box 2520
Sydney, NSW 2001



HEMI HOHEPA PTY LTD
2211 TAROMELO COURT
HOPE ISLAND QLD 4212

1 Shelley Street
Sydney, NSW 2000

account balance **\$430,909.75**
as at 30 Jun 22

account name HEMI HOHEPA PTY LTD ATF SW & RC
SUPER FUND
account no. 970313441

transaction	description	debits	credits	balance
29.03.22	OPENING BALANCE			0.00
05.05.22	Deposit AUSTRALIANSUPER 800000001649401464		106,918.64	106,918.64
25.05.22	Funds transfer WEIRSS1	2,500.00		104,418.64
25.05.22	Funds transfer 7001081124	2,500.00		101,918.64
31.05.22	Interest MACQUARIE CMA INTEREST PAID*		2.46	101,921.10
31.05.22	Deposit AUSTRALIANSUPER 800000001663751758		204,585.58	306,506.68
24.06.22	Deposit SAME DAY DEPOSIT REBECCA LEE CORAM ANDST		84,500.00	391,006.68
24.06.22	Deposit SAME DAY DEPOSIT REBECCA LEE CORAM ANDST		39,861.00	430,867.68
30.06.22	Interest MACQUARIE CMA INTEREST PAID*		42.07	430,909.75

how to make a transaction

online
Log in to www.macquarie.com.au/personal

by phone
Call 133 275 to make a phone transaction

transfers from another bank account
Transfer funds from another bank to this account:
BSB 182 512
ACCOUNT NO. 970313441

deposits using BPay
From another bank



Biller code: 667022
Ref: 970 313 441

continued on next



Macquarie Cash Management Account

enquiries 1800 806 310

account name HEMI HOHEPA PTY LTD ATF SW & RC
SUPER FUND
account no. 970313441

transaction	description	debits	credits	balance
	CLOSING BALANCE AS AT 30 JUN 22	5,000.00	435,909.75	430,909.75

* Interest rate for the period 30 March to 16 May: balances \$0.00 to \$4,999.99 earned 0.00% balances \$5,000.00 and above earned 0.00% pa (48 days); 17 May to 16 June: 0.05% pa (31 days); 17 June to 30 June: balances \$0.00 to \$4,999.99 earned 0.25% balances \$5,000.00 and above earned 0.25% pa (14 days)

continued on next



Macquarie Cash Management Account

enquiries 1800 806 310

account name HEMI HOHEPA PTY LTD ATF SW & RC
SUPER FUND
account no. 970313441

Please note the following financial services companies and/or financial advisers have authority on your account.

Name	Authority Type
YOUNG SAMUEL J SLG FINANCIAL SERVICES	Tax payment authority
LIVINGSTONE SIMON SIMMONS LIVINGSTONE & ASSOCIATES	Enquiry authority

Authority descriptions

Enquiry authority - you authorise the third party to have access to information about your account.

Tax payment authority - you authorise the third party to withdraw funds from your account to make payments on your behalf directly to the Australian Taxation Office (ATO).

Please consider carefully who you appoint as a third party authority on your account as we may follow their instructions as if they were yours. It is important that you understand this risk and carefully consider what level of authority you give to them. For more information on third party authority levels search 'Macquarie Help' in your browser to find our Help Centre.

annual interest summary 2021/2022

INTEREST PAID	44.53
TOTAL INCOME PAID	44.53

7-4



Macquarie Cash Management Account

enquiries 1800 806 310

account name HEMI HOHEPA PTY LTD ATF SW & RC
SUPER FUND
account no. 970313441

We offer several options that allow you to make payments and view transactions free of charge

- Electronic funds transfers up to \$5,000 a day using online banking.
- Increase your limit to \$100,000 using the Macquarie Authenticator App or nominate an account for unlimited transfers by contacting us.
- BPAY payments (subject to BPAY biller code limits) free of charge via online and mobile banking.
- Make the switch to free online statements by updating your preference online.

About your account

- Interest is calculated on daily balances and paid monthly. The interest rate is variable and may change at any time without prior notice.
- For more information about your account including fees and charges, mistaken payments or unauthorised transactions, please read the terms and conditions for your product, available at macquarie.com.au or by contacting us. If you have a complaint about our service, or to find out more about our dispute resolution procedures, please refer to macquarie.com.au/feedback-and-complaints.

Protect your account

- Please check each entry on this statement. If you think there is an error or unauthorised transaction, please contact us right away.
- If you have new contact details, please contact us to update them.
- This statement should be kept in a safe place at all times. Please read the Product Information Statement for more details about keeping your account secure.

Access to and sharing your data

- We may provide access to or share an electronic copy of your data (account details, balance, transaction history and personal information) with other parties at your or your Financial Services Professional's request. This includes people who work with or for your Financial Services Professional such as accountants, consultants, technology platform owner/operators and others, some of whom may not be in Australia.
- Please refer to the current offer document for more information and speak with your Financial Services Professional if you have questions about how your data may be used, disclosed and/or protected.

Visit our Help Centre

- Here you'll find answers to common questions about your account. For more information, please visit help.macquarie.com

Download the Macquarie Mobile Banking app

- The Macquarie Mobile Banking app makes managing your money simple and convenient.



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Leeza Cox

From: Sam Young
Sent: Wednesday, 6 July 2022 12:52 PM
To: Leeza Cox
Subject: NOITC - Weir and Coram

Confirming for last FY

Steve - \$39,861
Bec - \$84,500

To be claimed as concessional utilising catch up contribution caps.

Kind Regards,

Sam Young

PARTNER - FINANCIAL PLANNING

Tel [07 5561 8800](tel:0755618800) | Mob [0425 761 255](tel:0425761255) | Fax [07 5561 8700](tel:0755618700)

Email sam@simmonslivingstone.com.au

Web simmonslivingstone.com.au

30/340 Hope Island Road, Hope Island QLD 4212

PO Box 806, Oxenford QLD 4210



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& Associates**

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Carry-forward concessional contributions

If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met.

The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made.

The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

Total superannuation balance at 30 June 2021
\$199,208.54

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at 21 May 2022

Unused concessional contributions available to carry forward Eligible

\$27,898.12

Eligible to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2021.

2021-22 financial year

Description	Amount
Total carry-forward concessional contributions cap	\$75,000.00
Concessional contributions	\$47,101.88
Unused concessional contributions cap available to carry forward	\$27,898.12

Previous financial years

Financial year	Concessional contributions cap	Concessional contributions	Unused concessional contributions cap
01/07/2020 - 30/06/2021	\$25,000.00	\$16,228.14	\$8,771.86
01/07/2019 - 30/06/2020	\$25,000.00	\$16,040.34	\$8,959.66
01/07/2018 - 30/06/2019	\$25,000.00	\$14,833.40	\$10,166.60

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.

POSTED

Carry-forward concessional contributions

If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met.

The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made.

The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

Total superannuation balance at 30 June 2021
\$199,208.54

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at 03 July 2022

Unused concessional contributions available to carry forward Eligible

\$27,898.12

Eligible to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2021.

2021-22 financial year

Description	Amount
Total carry-forward concessional contributions cap	\$75,000.00
Concessional contributions	\$47,101.88
Unused concessional contributions cap available to carry forward	\$27,898.12

Previous financial years

Financial year	Concessional contributions cap	Concessional contributions	Unused concessional contributions cap
01/07/2020 - 30/06/2021	\$25,000.00	\$16,228.14	\$8,771.86
01/07/2019 - 30/06/2020	\$25,000.00	\$16,040.34	\$8,959.66
01/07/2018 - 30/06/2019	\$25,000.00	\$14,833.40	\$10,166.60

27500
102500

15536.52
62638.40

Unused
839861.60

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.



Concessional contributions

These are contributions that are made into the super fund **before tax**. They are taxed at a rate of 15% in the super fund.

Super funds report the contributions to us and we determine whether they are concessional contributions.

The decisions made with this information can have tax consequences. We recommend independent financial advice specific to individual circumstances is obtained.

Total superannuation balance at 30 June 2021

\$199,208.54

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at 25 September 2022

Remaining concessional contributions Cap available

\$11,963.48

Contributions are **within** the concessional contributions cap. If the concessional contributions cap is exceeded and the exceeded amount is not released, **more tax** may be due.

Description	Amount
Annual concessional contributions cap	\$27,500.00
Concessional contributions	\$15,536.52
Unused carry-forward concessional contributions applied from previous year(s)	\$0.00
Remaining concessional contributions cap	\$11,963.48

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.

Carry-forward concessional contributions

If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met. The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made. The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

Total superannuation balance at 30 June 2020
\$97,329.97

Visit [total superannuation balance](#) to learn more.

Financial year
2020-21

Current as at 24 April 2022

Unused concessional contributions available to carry forward Eligible
\$36,500.00

Eligible to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2020.

2020-21 financial year

Description	Amount
Total carry-forward concessional contributions cap	\$50,000.00
Concessional contributions	\$13,500.00
Unused concessional contributions cap available to carry forward	\$36,500.00

Previous financial years

Financial year	Concessional contributions cap	Concessional contributions	Unused concessional contributions cap
01/07/2019 - 30/06/2020	\$25,000.00	\$4,500.00	\$20,500.00
01/07/2018 - 30/06/2019	\$25,000.00	\$9,000.00	\$16,000.00

2021

25000

4500

2022

27500

?

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.

102500

18000

= 84500



Concessional contributions

These are contributions that are made into the super fund **before tax**. They are taxed at a rate of 15% in the super fund.

Super funds report the contributions to us and we determine whether they are concessional contributions.

The decisions made with this information can have tax consequences. We recommend independent financial advice specific to individual circumstances is obtained.

Total superannuation balance at 30 June 2020

\$97,329.97

Visit [total superannuation balance](#) to learn more.

Financial year

2020-21

Current as at 14 August 2022

Remaining concessional contributions Cap available

\$20,500.00

Contributions are **within** the concessional contributions cap. If the concessional contributions cap is exceeded and the exceeded amount is not released, **more tax** may be due.

Description	Amount
Annual concessional contributions cap	\$25,000.00
Concessional contributions	\$4,500.00
Unused carry-forward concessional contributions applied from previous year(s)	\$0.00
Remaining concessional contributions cap	\$20,500.00

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.



Concessional contributions

This screen will display contributions we have determined to be concessional contributions, so that it can be seen how the concessional contributions are tracking against the cap for the year.

Total superannuation balance at 30 June 2021
\$113,275.89

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at **30 September 2022**

i We currently have no concessional contributions information to display

This may be because:

- > We process all contributions through our systems to ensure they are identified correctly before we display them, and this may not have happened yet
- > Employer contributions may not be payable
- > Contributions may not have been made yet as the employer may pay super quarterly
- > The super fund (or funds) have not reported the contribution yet
- > The super fund (or funds) may be a defined benefit fund, self-managed super fund or other fund that reports this information annually and does not need to report contributions until **31 October** or later
- > Personal details held by the fund (or funds) may be different to the information we hold. Ensure [client details](#) are up to date with both the fund and the ATO