

# Self-managed superannuation fund annual return 2019

## Section A: Fund Information

1 Your tax file number

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 return. See the Privacy note in the declaration.

2 Name of self-managed superannuation fund (SMSF)

3 ABN

4 Current postal address

Street

Suburb/State/P'code

### 5 Annual return status

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

### 6 SMSF auditor

Auditor's name

Title

Family name

Given names

SMSF Auditor Number  Auditor's phone number

Postal address

Street

Suburb/State/P'code

Date audit was completed   Was Part A of the audit report qualified?

Was Part B of the audit report qualified?

### 7 Electronic funds transfer (EFT)

#### A Fund's financial institution account details

BSB no  Account no

Fund account name

I would like my tax refunds made to this account.

### 8 Status of SMSF

Australian superannuation fund

Fund benefit structure

Does the fund trust deed allow acceptance of the Government's Super Co-contributions and Low Income Super-Contribution?

Sensitive (when completed)

**9 Was the fund wound up during the income year?**

N

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**10 Exempt current pension income**

Did the fund pay an income stream (or super pension) that was in the retirement phase to one or more members?

N

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**Section B: Income**  
**11 Income**

Did you have a CGT event during the year?  
 Have you applied an exemption or rollover?

<b>G</b>	<input type="checkbox"/> Y
<b>M</b>	<input type="checkbox"/> N

Net capital gain		<b>A</b>	<input type="text" value="0"/>
Gross interest		<b>C</b>	<input type="text" value="7046"/>
Net foreign income		<b>D</b>	<input type="text" value="100"/>
Gross foreign income	<b>D1</b>	<input type="text" value="100"/>	
Unfranked dividend amount		<b>J</b>	<input type="text" value="5262"/>
Franked dividend amount		<b>K</b>	<input type="text" value="52284"/>
Dividend franking credit		<b>L</b>	<input type="text" value="22407"/>
Gross trust distributions		<b>M</b>	<input type="text" value="1274"/>
<b>Calculation of assessable contributions</b>		<b>R</b>	<input type="text" value="0"/>
plus No-TFN-quoted contributions	<b>R3</b>	<input type="text" value="0"/>	
<b>GROSS INCOME</b>		<b>W</b>	<input type="text" value="88373"/>
<b>TOTAL ASSESSABLE INCOME</b>		<b>V</b>	<input type="text" value="88373"/>

**Section C: Deductions and non-deductible expenses**  
**12 Deductions and non-deductible expenses**

	Deductions		Non-deductible expenses	
SMSF auditor fee	<b>H1</b>	<input type="text" value="1100"/>	<b>H2</b>	<input type="text"/>
Management and administration expenses	<b>J1</b>	<input type="text" value="2294"/>	<b>J2</b>	<input type="text"/>
<b>TOTAL DEDUCTIONS (A1 to M1)</b>	<b>N</b>	<input type="text" value="3394"/>		
<b>TOTAL NON-DEDUCTIBLE EXPENSES (A2 to L2)</b>			<b>Y</b>	<input type="text"/>
<b>TOTAL SMSF EXPENSES (N + Y)</b>	<b>Z</b>	<input type="text" value="3394"/>		
<b>TOTAL INCOME OR LOSS</b> (Total assessable income less deductions)	<b>O</b>	<input type="text" value="84979"/>		<input type="text"/>

**Sensitive** (when completed)

**Section D: Income tax calculation statement**

**13 Income tax calculation statement**

		Taxable income	<b>A</b>	84979.00
		Tax on taxable income	<b>T1</b>	12746.85
		Tax on no-TFN-quoted contributions	<b>J</b>	0.00
		<b>Gross tax</b>	<b>B</b>	12746.85
Foreign inc. tax offsets	<b>C1</b>	0.13	<b>C</b>	0.13
Rebates and tax offsets	<b>C2</b>			
		Non-refundable non-c/f tax offsets (C1 + C2)		
		<b>SUBTOTAL 1</b>	<b>T2</b>	12746.72
ESVCLP tax offset	<b>D1</b>		<b>D</b>	
ESVCLP tax offset c/f from previous year	<b>D2</b>			
ESIC tax offset	<b>D3</b>			
ESIC tax offset c/f from previous year	<b>D4</b>			
		Non-refundable c/f tax offsets (D1+D2+D3+D4)		
		<b>SUBTOTAL 2</b>	<b>T3</b>	12746.72
Complying fund's franking credits tax offset	<b>E1</b>	22445.69	<b>E</b>	22445.69
No-TFN tax offset	<b>E2</b>			
NRAS tax offset	<b>E3</b>			
Exploration cr. tax offset	<b>E4</b>			
		Refundable tax offsets (E1 + E2 + E3 + E4)		
<i>Credit:</i>		<b>TAX PAYABLE</b>	<b>T5</b>	0.00
Int. on early payments	<b>H1</b>		<b>G</b>	
Foreign res. w/holding (excl. capital gains)	<b>H2</b>			
ABN/TFN not quoted	<b>H3</b>			
TFN w/held from closely held trusts	<b>H5</b>			
Int. on no-TFN tax offset	<b>H6</b>			
Credit for foreign res. capital gains w/holding	<b>H8</b>			
		Eligible credits (H1 + H2 + H3 + H5 + H6 + H8)	<b>H</b>	
		Tax offset refunds	<b>I</b>	9698.97
		PAYG installments raised	<b>K</b>	
		Supervisory levy	<b>L</b>	259.00
		Supervisory levy adj. for wound up funds	<b>M</b>	
		Supervisory levy adj. for new funds	<b>N</b>	
		<b>TOTAL AMOUNT REFUNDABLE</b>	<b>S</b>	9439.97
		(T5 + G - H - I - K + L - M + N)		

**Section E: Losses**

**14 Losses information**

Net capital losses carried forward to later years	<b>V</b>	8328
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**Section F: Member information**

**MEMBER NUMBER: 1**

Title	<input type="text" value="Mr"/>	Account status	<input type="text" value="O"/>
First name	<input type="text" value="RUSSELL"/>		
Other names	<input type="text"/>		
Surname	<input type="text" value="JACOBSEN"/>		
Suffix	<input type="text"/>		
Member's TFN	<input type="text" value="116 348 082"/>	Date of birth	<input type="text" value="23/12/1944"/>

See the Privacy note in the Declaration

<b>OPENING ACCOUNT BALANCE</b>	<input type="text" value="602528.00"/>
<b>TOTAL CONTRIBUTIONS</b> (Sum of labels A to M)	<b>N</b> <input type="text" value="0.00"/>

**Other transactions**

Allocated earnings or losses		<b>O</b> <input type="text" value="65837.00"/>
Accumulation phase account balance	<b>S1</b> <input type="text" value="668365.00"/>	
Retirement phase account bal. - Non CDBIS	<b>S2</b> <input type="text" value="0.00"/>	
Retirement phase account balance - CDBIS	<b>S3</b> <input type="text" value="0.00"/>	
TRIS Count	<input type="text" value="0"/>	
<b>CLOSING ACCOUNT BALANCE</b>		<b>S</b> <input type="text" value="668365.00"/>
Accumulation phase value		<b>X1</b> <input type="text" value="668365.00"/>

**MEMBER NUMBER: 2**

Title	<input type="text" value="Mrs"/>	Account status	<input type="text" value="O"/>
First name	<input type="text" value="SUSANNE"/>		
Other names	<input type="text"/>		
Surname	<input type="text" value="JACOBSEN"/>		
Suffix	<input type="text"/>		
Member's TFN	<input type="text" value="256 694 667"/>	Date of birth	<input type="text" value="26/06/1943"/>

See the Privacy note in the Declaration

<b>OPENING ACCOUNT BALANCE</b>	<input type="text" value="695686.00"/>
<b>TOTAL CONTRIBUTIONS</b> (Sum of labels A to M)	<b>N</b> <input type="text" value="0.00"/>

**Other transactions**

Allocated earnings or losses		<b>O</b> <input type="text" value="76016.00"/>
Accumulation phase account balance	<b>S1</b> <input type="text" value="771702.00"/>	
Retirement phase account bal. - Non CDBIS	<b>S2</b> <input type="text" value="0.00"/>	
Retirement phase account balance - CDBIS	<b>S3</b> <input type="text" value="0.00"/>	
TRIS Count	<input type="text" value="0"/>	
<b>CLOSING ACCOUNT BALANCE</b>		<b>S</b> <input type="text" value="771702.00"/>
Accumulation phase value		<b>X1</b> <input type="text" value="771702.00"/>

**Section H: Assets and liabilities**

**15 ASSETS**

15a Australian managed investments	
Listed trusts	<b>A</b> <input type="text" value="36554"/>

Sensitive (when completed)

**VISTA GRAPHICS PTY LTD PROVIDENT FUND**

Client ref

JAC504

File no 95 749 367

ABN 71 084 391 754

15b Australian direct investments

**Limited Recourse Borrowing Arrangements**

Australian residential real property	<b>J1</b> <input type="text"/>	}	Cash and term deposits	<b>E</b> <input type="text"/>	403710
Australian non-residential real property	<b>J2</b> <input type="text"/>		Debt securities	<b>F</b> <input type="text"/>	
Overseas real property	<b>J3</b> <input type="text"/>		Loans	<b>G</b> <input type="text"/>	
Australian shares	<b>J4</b> <input type="text"/>		Limited recourse borrowing arrangements (J1 to J6)	<b>H</b> <input type="text"/>	1022485
Overseas shares	<b>J5</b> <input type="text"/>		Non-residential real property	<b>I</b> <input type="text"/>	
Other	<b>J6</b> <input type="text"/>		Residential real property	<b>J</b> <input type="text"/>	
			Collectables and personal use assets	<b>K</b> <input type="text"/>	
			Other assets	<b>L</b> <input type="text"/>	
				<b>M</b> <input type="text"/>	
				<b>N</b> <input type="text"/>	
				<b>O</b> <input type="text"/>	9699

**TOTAL AUSTRALIAN AND OVERSEAS ASSETS**  
(sum of labels A to T)

**U**  1472448

15e In-house assets

Did the fund have a loan to, lease to or investment in, related parties (known as in-house assets) at the end of the income year?

**A N**

**16 Liabilities**

Borrowings for limited recourse borrowing arrangements	<b>V1</b> <input type="text"/>	}	Borrowings	<b>V</b> <input type="text"/>	
Permissible temporary borrowings	<b>V2</b> <input type="text"/>		Total member closing account balances	<b>W</b> <input type="text"/>	1440067
Other borrowings	<b>V3</b> <input type="text"/>		Reserve accounts	<b>X</b> <input type="text"/>	
			Other liabilities	<b>Y</b> <input type="text"/>	32381
			<b>TOTAL LIABILITIES</b>	<b>Z</b> <input type="text"/>	1472448

Sensitive (when completed)

**Section K: Declarations**  
**Important**

Before making this declaration check to ensure 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 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 more information about your privacy go to [ato.gov.au/privacy](http://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 (if required) 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  Date

**Preferred trustee, director or public officer's contact details:**

Title   
 Family name and suffix   
 Given and other names   
 Phone number   
 Non-individual trustee name

**Time taken to prepare and complete this tax return (hours)**

**TAX AGENT'S DECLARATION:**

We declare that the Self-managed superannuation fund annual return 2019 has been prepared in accordance with information provided by the trustees, that the trustees have given us a declaration stating that the information provided to us is true and correct, and that the trustees have authorised us to lodge this annual return.

Tax agent's signature  Date

**Tax agent's contact details**

Title   
 Family name and suffix   
 Given and other names   
 Tax agent's practice   
 Tax agent's phone   
 Reference number   
 Tax agent number

**NOTE: THIS PRINT-OUT IS NOT TO BE LODGED WITH THE ATO.**

**Sensitive** (when completed)

VISTA GRAPHICS PTY LTD PROVIDENT FUND

Client ref

JAC504

File no 95 749 367

ABN 71 084 391 754

**1. Current year capital gains and capital losses**

	Capital gain	Capital loss
Shares in companies listed on an Australian securities exchange	<b>A</b> 10981	<b>K</b> 1384
Amount of capital gains from a trust (including a managed fund)	<b>G</b> 91	
<b>Total current year capital gains</b>	<b>J</b> 11072	

**2. Capital losses**

<b>Total current year capital losses</b>	<b>A</b> 1384
Total current year capital losses applied	<b>B</b> 1384
Total prior year net capital losses applied	<b>C</b> 9688
<b>Total capital losses applied</b>	<b>E</b> 11072

**3. Unapplied net capital losses carried forward**

Other net capital losses carried forward to later income years	<b>B</b> 8328
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**6. Net capital gain**

Net capital gain	<b>A</b> 0
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NOTE: THIS PRINT-OUT IS NOT TO BE LODGED WITH THE ATO.

**Interest Income**

Financial institution Branch Sharing status (if applicable)	Account Number	TFN withholding	Interest
WESTPAC CMT			215.96
WESTPAC TERM DEPOSITS			6830.34
Total share for this return			7046

**Gross dividends**  
 (excluding distributions from cash management, property and certain other unit trusts)

Company Share status (if applicable)	Unfranked dividends	Franked dividends	Franking credits	TFN withholding
PER SOL 6 IRS	10492.12	52284.49	22407.62	
LESS APA TAX DEFERRED	-2032.52	0.00	0.00	
LESS CMW & SGP	-3196.87	0.00	0.00	
<b>Total</b>	<b>5262.73</b>	<b>52284.49</b>	<b>22407.62</b>	

**Foreign Income Schedule**

**LIST OF TRANSACTIONS**

Type Description Currency	Gross Amount	Deductions	Net Amount	Foreign Tax Paid
Type G General Description: Dft: CROMWELL PROPERTY GROUP AUD (Australia, Dollars)	5		5	0.01
Type G General Description: Dft: APN MANAGED FUNDS AUD (Australia, Dollars)	95		95	0.12
<b>TOTALS SUMMARY</b> (Includes any available prior year unutilised foreign tax).	<b>100</b>		<b>100</b>	<b>0.13</b>

VISTA GRAPHICS PTY LTD PROVIDENT FUND

Client ref

JAC504

File no 95 749 367

ABN 71 084 391 754

**Distributions from Trusts**  
Including Cash Management or Listed Property Trusts

Trust Name	CROMWELL PROPERTY GROUP		
TFN		Trust Type	P

**Arm's length income**

Unfranked Dividend	Franked Dividend	Franking Credit	Other Trust Income
		0.53	700

Foreign income	Income	Tax credit	Class	Deduction
	5	0.01	G	

Trust Name	APN MANAGED FUNDS		
TFN		Trust Type	P

**Arm's length income**

Unfranked Dividend	Franked Dividend	Franking Credit	Other Trust Income
		37.54	125

Foreign income	Income	Tax credit	Class	Deduction
	95	0.12	G	

Trust Name	STOCKLAND TRUST		
TFN		Trust Type	P

**Arm's length income**

Unfranked Dividend	Franked Dividend	Franking Credit	Other Trust Income
		0.00	449

Capital gains	Indexed	Discount (net)	Other
		61	

**Subtotals**

**Arm's length income**

Unfranked Dividend	Franked Dividend	Franking Credit	Other Trust Income
		38.07	1274

Capital gains	Indexed	Discount (net)	Other
		61	

Foreign income	Income	Tax credit	Deduction
	100	0.13	

Form F  
VISTA GRAPHICS PTY LTD PROVIDENT FUND  
File no 95 749 367  
ABN 71 084 391 754

Capital Gains Schedules 2019

Client ref JAC504

Item: 0 PRIOR YEAR LOSS

Category: S Shares  
Method: OT Other

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
PRIOR YEAR LOSS	690					690
Total:	690					690
Reduced Cost Base:						690

Capital Gain/Loss

Consideration Received	
Reduced Cost Base	690
Capital Loss	690

Item: 1 AGL NOTES

Category: S Shares  
Method: OT Other

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
AGL NOTES	21084	01/07/2016	19700	30/06/2019		21084
Total:	21084		19700			21084
Reduced Cost Base:						21084

Capital Gain/Loss

Consideration Received	19700
Reduced Cost Base	21084
Capital Loss	1384

Item: 2 COLES GROUP

Category: S Shares  
Method: OT Other

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
COLES GROUP	15318	01/11/2018	17045	15/12/2018		15318
Total:	15318		17045			15318

Capital Gain/Loss

Capital Gain	1727
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Item: 3 NIB HOLDINGS

Category: S Shares  
 Method: DS Discount

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
NIB HOLDINGS	4790	01/07/2016	14044	30/06/2019	N/A	4790
Total:	4790		14044			4790

Capital Gain/Loss

Capital Gain						9254
Adjusted Discount Percentage		33.33%				3085
Reduced Discount Capital Gain						6169

Item: 0 PRIOR YEAR LOSS

Category: U Units in unit Trusts (s104-70 income)  
 Method: OT Other

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
PRIOR YEAR LOSS	17326					17326
Total:	17326					17326
Reduced Cost Base:						17326

Capital Gain/Loss

Consideration Received						
Reduced Cost Base						17326
Capital Loss						17326

Item: 1 Dft: STOCKLAND TRUST

Category: Z Values from Trust distribution schedules  
 Method: DS Discount

Description	Cost	Date Acquired	Consider'n Received	Date Disposed	Index Factor	Cost Base
Dft: STOCKLAND TRUST			61		N/A	
Total:			61			

Capital Gain/Loss

Capital Gain						92
Adjusted Discount Percentage		33.33%				31
Reduced Discount Capital Gain						61

Item Description	Acquired	Disposed	Consideration Received	Cost Base Amount Type	Gain/Loss
<b>Other Assets</b>					
<b>A. SUMMARY</b>					
<b>1. Frozen/Other Capital Gains</b>					
Shares in companies listed on an Australian Securities Exchange - Category S					
2 COLES GROUP	01/11/2018	15/12/2018	17045	15318 C	1727
					<b>1727</b>
<b>2. Discount Capital Gains</b>					
Shares in companies listed on an Australian Securities Exchange - Category S					
3 NIB HOLDINGS	01/07/2016	30/06/2019	14044	4790 DS	9254
Values from P&T distribution schedules - Category Z					
1 Dft: STOCKLAND TRUST			61	DS	92
					<b>9346</b>
<b>Less: Discount</b>					<b>-3116</b>
<b>Total Discount Capital Gains</b>					<b>6230</b>
<b>3. Current Year Capital Losses</b>					
Shares in companies listed on an Australian Securities Exchange - Category S					
1 AGL NOTES	01/07/2016	30/06/2019	19700	21084 R	-1384
					<b>-1384</b>
<b>Sub-total Current Year Capital Losses</b>					<b>-1384</b>
<b>4. Prior Year/Losses Transferred In</b>					
a. Prior Year Capital Losses					
Shares in companies listed on an Australian Securities Exchange - Category S					
0 PRIOR YEAR LOSS				690 C	-690
Units in unit trusts listed on an Australian Securities Exchange - Category U					
0 PRIOR YEAR LOSS				17326 C	-17326
					<b>-18016</b>

Key to Cost Base Type:  
 C = Cost base (asset owned less than 12 months)  
 R = Reduced cost base (loss)  
 I = Indexed cost base (per CPI)  
 D = Deemed threshold  
 DS = Discount Method

Item Description	Acquired	Disposed	Consideration Received	Cost Base Amount Type	Gain/Loss
<b>B. APPLICATION OF CAPITAL LOSSES</b>					
Description	Capital Gain		Current Year Loss Applied	Prior Year/ T'ferred In Loss Applied	Residual Cap Gain
3,4a,4b Capital Losses			1384	18016	
1. Frozen/Other Capital Gains	1727		1384	343	0
2. Nominal Pre-discount Gains	9346		0	9346	0
6. Net Collectable Frozen/Other			0	0	0
7. Net Collectable Pre-disc Gains			0	0	0
8. Personal Use Frozen/Other			0	0	0
9. Personal Use Pre-discount Gains			0	0	0
Total Remaining Capital Losses			0	8327	

<b>C. NET CAPITAL GAIN/LOSS CALCULATION</b>	
Unapplied Current Year Losses	0
Unapplied Prior Year/Losses Transferred In	-8327
<b>Total Capital Losses Carried Forward</b>	<b>-8327</b>

**TOTAL NET CAPITAL GAIN SUMMARY**

Other Assets	-8327
Collectables	
Personal Use Assets	
<b>Total Net Capital Losses</b>	<b>-8327</b>

**Accumulated Losses To Carry Forward**

Other assets	8327
	8327 (Returned at Net Capital Losses carried forward)

Please note that due to the method of calculation, the summary report may be subject to rounding errors.

**PART A****Electronic lodgment declaration (Form P, T, F, SMSF or EX)**

This declaration is to be completed where the tax return is to be lodged via an approved ATO electronic channel. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

Tax File Number  Year of return

Name of Partnership, Trust, Fund or Entity

Total Income/Loss

Total Deductions

Taxable Income/Loss

**Privacy**

The ATO is authorised by the Taxation Administration Act 1953 to request the provision of tax file numbers (TFNs). The ATO will use the TFNs to identify each partner or beneficiary or entity in our records. It is not an offence not to provide the TFNs. However, you cannot lodge your tax return electronically if you do not quote your TFN.

Taxation law authorises the ATO to collect information and disclose it to other government agencies, including personal information about the person authorised to sign the declaration. For information about privacy go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

**The Australian Business Register**

The Commissioner of Taxation, as Registrar of the Australian Business Register, may use the ABN and business details which you provide on this tax return to maintain the integrity of the register.

Please refer to the privacy statement on the Australian Business Register (ABR) website ([www.abr.gov.au](http://www.abr.gov.au)) for further information - it outlines our commitment to safeguarding your details.

**Electronic funds transfer - direct debit**

Where you have requested an EFT direct debit some of your details will be provided to your financial institution and the Tax Office's sponsor bank to facilitate the payment of your taxation liability from your nominated account.

I authorise my tax agent to electronically transmit this tax return via an approved ATO electronic channel.

**Important:** Before making this declaration please check to ensure that all income has been disclosed and the tax return is true and correct in every detail. If you are in doubt about any aspect of the tax return, place all the facts before the Tax Office. The tax law provides heavy penalties for false or misleading statements on tax returns.

**Declaration:** I declare that:

- \* all the information I have provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- \* I authorise the agent to give this document to the Commissioner of Taxation.

Signature of Partner, Trustee or Director

Date

**PART B****ELECTRONIC FUNDS TRANSFER CONSENT**

This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through an approved ATO electronic channel.

This declaration must be signed by the partner, trustee, director or public officer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.

**Important:** Care should be taken when completing EFT details as the payment of any refund will be made to the account specified.

Account name:

I authorise the refund to be deposited directly to the specified account

Signature

Date

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**PART D Tax agent's certificate (shared facilities only)**

We, STIRLING WARTON TAYLOR PTY LTD declare that:

- \* We have prepared this tax return in accordance with the information supplied by the partner, trustee, director or public officer
- \* We have received a declaration made by the entity that the information provided to us for the preparation of this tax return is true and correct, and
- \* We are authorised by the partner, trustee, director or public officer to lodge this tax return, including any applicable schedules.

Agent's Signature

Date

Agent's phone

Client's reference

Agent's Contact Name

Agent's reference number