

# SMSF Tax Return

# 2023

1 Jul 2022—30 Jun 2023

TFN Recorded

**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 the Tax Office's electronic lodgment service (ELS). 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.

**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 However, you cannot lodge your tax return electronically if you do not quote your TFN.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 to disclose it to other government agencies. For information about your 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.

| Tax File Number | Name of partnership, trust, fund or entity | Year |
|-----------------|--|------|
| TFN Recorded    | Harper Swarz SMSF                          | 2023 |


I authorise my tax agent to electronically transmit this tax return via the electronic lodgment service.

**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:**

- the information provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- the agent is authorised to lodge this tax return.

|  |                    |
|--|--------------------|
| Signature of partner, trustee or director<br> | Date<br>19/02/2024 |
|--|--------------------|

**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 the electronic lodgment service ELS.

This declaration must be signed by the taxpayer 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, including any family tax benefit, will be made to the account specified.

| Agent Ref No. | BSB Number | Account Number | Account Name                  |
|---------------|------------|----------------|-------------------------------|
| 24659936      | 182512     | 966915209      | Harper Swarz SMSF Pty Ltd ATF |

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

|  |                               |
|--|-------------------------------|
| <p>Signature</p>  | <p>Date</p> <p>19/02/2024</p> |
|--|-------------------------------|

**PART D TAX AGENTS CERTIFICATE (SHARED FACILITIES USERS ONLY)**

| Client Ref | Agent Ref No. | Contact Name                       | Contact No. |
|------------|---------------|------------------------------------|-------------|
| SWARDS1    | 24659936      | Simmons Livingstone and Associates | 0755618800  |

**Declaration - I declare that:**

- I have prepared this tax return and/or family tax benefit tax claim in accordance with the information supplied by the taxpayer
- I have received a declaration made by the taxpayer that the information provided to me for the preparation of this document is true and correct, and
- I am authorised by the taxpayer to lodge this tax return and any applicable schedules that are attached.

|                          |             |
|--------------------------|-------------|
| <p>Agent's Signature</p> | <p>Date</p> |
|--------------------------|-------------|

## Section A: Fund information

Period start 01/07/2022

Period end 30/06/2023

**1 TAX FILE NUMBER** TFN Recorded

**2 NAME OF SELF-MANAGED SUPERANNUATION FUND (SMSF)** Harper Swarz SMSF

**3 AUSTRALIAN BUSINESS NUMBER** 33 642 859 530

**4 CURRENT POSTAL ADDRESS**

| Address                 | Town/City   | State | Postcode |
|-------------------------|-------------|-------|----------|
| 30/340 Hope Island Road | HOPE ISLAND | QLD   | 4212     |

**5 ANNUAL RETURN STATUS**

Is this the first required return for a newly registered SMSF? No

**6 SMSF AUDITOR**

Title Mr

First name Anthony

Other name William

Family name Boys

Suffix

SMSF auditor number 100 014 140

Contact number 04-10712708

| Auditor Address | Town/City   | State | Postcode |
|-----------------|-------------|-------|----------|
| PO Box 3376     | Rundle Mall | SA    | 5000     |

Date audit was completed **A**

Was part A of the audit report qualified? **B**

Was part B of the audit report qualified? **C**

If Part B of the audit report was qualified, have the reported issues been rectified? **D**

**7 ELECTRONIC FUNDS TRANSFER (EFT)**

**A. Fund's financial institution account details**

BSB number 182512

Account number 966915209

Account name Harper Swarz SMSF Pty Ltd ATF

I would like my tax refunds made to this account Yes

**C. Electronic service address alias** BGLSF360

**8 STATUS OF SMSF**

Australian superannuation fund? **A** Yes

Fund benefit structure **B** A

Does the fund trust deed allow acceptance of the Government's Super Co-contribution and Low Income Super Contribution? **C** Yes

**9 WAS THE FUND WOUND UP DURING THE YEAR?**

Date fund was wound up

Have all tax lodgment and payment obligations been met?

**10 EXEMPT CURRENT PENSION INCOME**

Did the fund pay retirement phase superannuation income stream benefits to one or more members in the income year? No

Exempt current pension income amount **A**Which method did you use to calculate your exempt current pension income? **B**Was an actuarial certificate obtained? **D**Did the fund have any other income that was assessable? **E**

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 not complete Section B: Income.)**

If you are entitled to claim any tax offsets, you can list these at Section D: Income tax calculation statement.

**Section B: Income****11 INCOME****Prior year losses brought forward**

Net Capital Losses from Collectables

Other Net Capital Losses

Did you have a CGT event during the year? **G** NoHave you applied an exemption or rollover? **M**Net capital gain **A****Losses carried forward**

Net Capital Losses from Collectables \$0.00

Other Net Capital Losses \$0.00

Gross rent and other leasing and hiring **B** \$23,404.00Gross interest income **C** \$675.00

Tax file number amounts withheld from gross interest

Forestry managed investment scheme income **X**Gross foreign income **D1**Net foreign income **D**Australian franking credits from a New Zealand company income **E**Transfers from foreign funds income **F**Gross payments where ABN not quoted **H**Gross distribution from partnerships income **I**Unfranked dividends **J**

|  |  |           |             |
|--|--|-----------|-------------|
| Franked dividend income amount   |  | <b>K</b>  |             |
| Franking credit  |  | <b>L</b>  |             |
| Tax file number amounts withheld from dividends                                      |  |           |             |
| Gross distribution from trusts income  |  | <b>M</b>  |             |
| <b>Assessable contributions</b>  | (R1 + R2 + R3 less R6)                 | <b>R</b>  | \$25,334.00 |
| Assessable employer contributions  |  | <b>R1</b> | \$25,334.00 |
| Assessable personal contributions  |  | <b>R2</b> |             |
| No-TFN-quoted contributions  |  | <b>R3</b> | \$0.00      |
| The transfer of liability to a Life Insurance Company or Pooled Superannuation Trust |  | <b>R6</b> |             |
| Gross payments foreign resident income   |  |           |             |
| Other income   |  |           |             |
| <b>Total other income</b>  |  | <b>S</b>  |             |
| Assessable income due to a changed tax status of the fund                            |  | <b>T</b>  |             |
| <b>Net non-arm's length income</b>   | (Subject to 47% tax rate U1 + U2 + U3) | <b>U</b>  |             |
| Net non-arm's length private company dividends                                       |  | <b>U1</b> |             |
| Net non-arm's length trust distributions   |  | <b>U2</b> |             |
| Net other non-arm's length income  |  | <b>U3</b> |             |
| <b>Gross income</b>  |  | <b>W</b>  | \$49,413.00 |
| Exempt current pension income  |  | <b>Y</b>  |             |
| <b>Total assessable income</b>   |  | <b>V</b>  | \$49,413.00 |

## Section C: Deductions and non-deductible expenses

### 12 DEDUCTIONS

|  |          | Deductions                                      | Non-Deductible Expenses                 |
|--|----------|---|---|
| Interest expenses within Australia         | A1       | \$12,138.00                                     | A2                                      |
| Interest expenses overseas                 | B1       |   | B2                                      |
| Capital works expenditure                  | D1       | \$5,570.00                                      | D2                                      |
| Low value pool                             |          |   |   |
| Capital allowance                          |          | \$1,754.00                                      |   |
| Other depreciation                         |          |   |   |
| Decline in value of depreciating assets    | E1       | \$1,754.00                                      | E2                                      |
| Insurance premiums – members               | F1       | \$4,759.00                                      | F2                                      |
| SMSF auditor fee                           | H1       | \$330.00  | H2                                      |
| Investment expenses                        | I1       | \$8,336.00                                      | I2                                      |
| Management and administration expenses     | J1       | \$3,704.00                                      | J2                                      |
| Forestry managed investment scheme expense | U1       |   | U2                                      |
| Other amounts                              | L1       |   | L2                                      |
|  |          |   | \$1,593.00                              |
|  |          |   | O - Other expenses not listed elsewhere |
| Tax losses deducted                        | M1       |   |   |
| <b>Totals</b>                              | <b>N</b> | <b>\$36,591.00</b>                              | <b>Y</b>                                |
| <b>Total SMSF expenses</b>                 |          | (N + Y)   | <b>Z</b>                                |
|  |          |   | <b>\$38,184.00</b>                      |
| <b>Taxable income or loss</b>              |          | (TOTAL ASSESSABLE INCOME less TOTAL DEDUCTIONS) | <b>O</b>                                |
|  |          |   | <b>\$12,822.00</b>                      |

## Section D: Income tax calculation statement

### 13 CALCULATION STATEMENT

|  |                                       |           |                   |
|--|---------------------------------------|-----------|-------------------|
| Taxable income                               |                                       | A         | \$12,822.00       |
| Tax on taxable income                        |                                       | T1        | \$1,923.30        |
| Tax on no-TFN-quoted contributions           |                                       | J         | \$0.00            |
| Gross tax                                    |                                       | B         | \$1,923.30        |
| Non-refundable non-carry forward tax offsets | (C1 + C2)                             | C         |                   |
| Foreign income tax offset                    |                                       | C1        |                   |
| Rebates and tax offsets                      |                                       | C2        |                   |
| <b>Subtotal</b>                              | (B less C - cannot be less than zero) | <b>T2</b> | <b>\$1,923.30</b> |

|   |   |           |                   |
|---|---|-----------|-------------------|
| <b>Non-refundable carry forward tax offsets</b>   | (D1 + D2 + D3 + D4)                           | <b>D</b>  |                   |
| Early stage venture capital limited partnership tax offset                                    |   | <b>D1</b> |                   |
| Early stage venture capital limited partnership tax offset carried forward from previous year |   | <b>D2</b> |                   |
| Early stage investor tax offset   |   | <b>D3</b> |                   |
| Early stage investor tax offset carried forward from previous year                            |   | <b>D4</b> |                   |
| <b>Subtotal</b>   | <b>(T2 less D – cannot be less than zero)</b> | <b>T3</b> | <b>\$1,923.30</b> |
| <b>REFUNDABLE TAX OFFSETS</b>   | (E1 + E2 + E3 + E4)                           | <b>E</b>  | \$0.00            |
| Complying fund's franking credits tax offset  |   | <b>E1</b> | \$0.00            |
| No-TFN tax offset   |   | <b>E2</b> |                   |
| National rental affordability scheme tax offset   |   | <b>E3</b> |                   |
| Exploration credit tax offset   |   | <b>E4</b> |                   |
| Tax Payable   |   | <b>T5</b> | \$1,923.30        |
| Section 102AAM interest charge  |   | <b>G</b>  |                   |
| <b>Eligible credits</b>   | (H2 + H3 + H5 + H6 + H8)                      | <b>H</b>  |                   |
| Credit for tax withheld – foreign resident withholding (excluding capital gains)              |   | <b>H2</b> |                   |
| Credit for tax withheld – where ABN or TFN not quoted (non-individual)                        |   | <b>H3</b> |                   |
| Credit for TFN amounts withheld from payments from closely held trusts                        |   | <b>H5</b> |                   |
| Credit for interest on no-TFN tax offset  |   | <b>H6</b> |                   |
| Credit for amounts withheld from foreign resident capital gains withholding                   |   | <b>H8</b> |                   |
| Tax offset refunds (Remainder of refundable tax offsets)                                      |   | <b>I</b>  | \$0.00            |
| PAYG instalments raised   |   | <b>K</b>  | \$1,383.00        |
| Supervisory levy  |   | <b>L</b>  | \$259.00          |
| Supervisory levy adjustment for wound up funds  |   | <b>M</b>  | \$0.00            |
| Supervisory levy adjustment for new funds   |   | <b>N</b>  | \$0.00            |
| <b>Amount payable</b>   |   | <b>S</b>  | <b>\$799.30</b>   |

## Section E: Losses

|  |          |
|--|----------|
| <b>14</b> LOSSES   |          |
| Tax losses carried forward to later income years         | <b>U</b> |
| Net capital losses carried forward to later income years | <b>V</b> |

## Section H: Assets and liabilities

|   |          |
|---|----------|
| <b>15</b> ASSETS                          |          |
| <b>15a</b> Australian managed investments |          |
| Listed trusts                             | <b>A</b> |
| Unlisted trusts                           | <b>B</b> |
| Insurance policy                          | <b>C</b> |
| Other managed investments                 | <b>D</b> |

**15b Australian direct investments**

|  |           |              |
|--|-----------|--------------|
| Cash and term deposits                         | <b>E</b>  | \$36,316.00  |
| Debt securities                                | <b>F</b>  |              |
| Loans  | <b>G</b>  |              |
| Listed shares                                  | <b>H</b>  |              |
| Unlisted shares                                | <b>I</b>  |              |
| <b>Limited recourse borrowing arrangements</b> | <b>J</b>  | \$632,000.00 |
| Australian residential real property           | <b>J1</b> | \$632,000.00 |
| Australian non-residential real property       | <b>J2</b> |              |
| Overseas real property                         | <b>J3</b> |              |
| Australian shares                              | <b>J4</b> |              |
| Overseas shares                                | <b>J5</b> |              |
| Other  | <b>J6</b> |              |
| Property Count                                 | <b>J7</b> | 1            |
| Non-residential real property                  | <b>K</b>  |              |
| Residential real property                      | <b>L</b>  |              |
| Collectables and personal use assets           | <b>M</b>  |              |
| Other assets                                   | <b>O</b>  | \$1,346.00   |

**15c Other investments**

|                 |          |  |
|-----------------|----------|--|
| Crypto-Currency | <b>N</b> |  |
|-----------------|----------|--|

**15d Overseas direct investments**

|   |          |                     |
|---|----------|---------------------|
| Overseas shares                             | <b>P</b> |                     |
| Overseas non-residential real property      | <b>Q</b> |                     |
| Overseas residential real property          | <b>R</b> |                     |
| Overseas managed investments                | <b>S</b> |                     |
| Other overseas assets                       | <b>T</b> |                     |
| <b>Total Australian and overseas assets</b> | <b>U</b> | <b>\$669,662.00</b> |

**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? | <b>A</b> |  |
|---|----------|--|

**15f Limited recourse borrowing arrangements**

|  |          |     |
|--|----------|-----|
| If the fund had an LRBA were the LRBA borrowings from a licensed financial institution?                | <b>A</b> | Yes |
| Did the members or related parties of the fund use personal guarantees or other security for the LRBA? | <b>B</b> | Yes |



**16** LIABILITIES

|  |           |                     |
|--|-----------|---------------------|
| <b>Borrowings</b>                                      | <b>V</b>  | \$166,859.00        |
| Borrowings for limited recourse borrowing arrangements | <b>V1</b> | \$166,859.00        |
| Permissible temporary borrowings                       | <b>V2</b> |                     |
| Other borrowings                                       | <b>V3</b> |                     |
| Total member closing account balances                  | <b>W</b>  | \$502,263.00        |
| Reserve accounts                                       | <b>X</b>  |                     |
| Other liabilities                                      | <b>Y</b>  | \$540.00            |
| <b>Total liabilities</b>                               | <b>Z</b>  | <b>\$669,662.00</b> |

**17** TAXATION OF FINANCIAL ARRANGEMENTS (TOFA)

|                          |          |
|--------------------------|----------|
| <b>Total TOFA gains</b>  | <b>H</b> |
| <b>Total TOFA losses</b> | <b>I</b> |

**Section J: Other information****FAMILY TRUST ELECTION STATUS**

|   |          |
|---|----------|
| Select the income year of the election          | <b>A</b> |
| Family trust election revocation/variation code | <b>B</b> |

**INTERPOSED ENTITY ELECTION STATUS**

|  |          |
|--|----------|
| Select the earliest income year elected    | <b>C</b> |
| Interposed entity election revocation code | <b>D</b> |

**Section K: Declarations****PREFERRED TRUSTEE OR DIRECTOR CONTACT DETAILS**

|                               |                           |
|-------------------------------|---------------------------|
| Title                         | Mr                        |
| First name                    | Daryle                    |
| Other name                    |                           |
| Family name                   | Swarz                     |
| Suffix                        |                           |
| Non-individual trustee name   | Harper Swarz SMSF Pty Ltd |
| ABN of non-individual trustee |                           |
| Contact number                | 07 55618800               |
| Email address                 |                           |

**TAX AGENT'S CONTACT DETAILS**

|                |                                  |
|----------------|----------------------------------|
| Practice name  | Simmons Livingstone & Associates |
| Title          | Mr                               |
| First name     | Simon                            |
| Other name     |                                  |
| Family name    | Livingstone                      |
| Suffix         |                                  |
| Contact number | 07 55618800                      |

**HOURS TAKEN TO PREPARE AND COMPLETE THIS RETURN**

**Member 1 — Swarz, Daryle Shane (TFN Recorded)**

|   |                             |
|---|-----------------------------|
| Account status  | Open                        |
| Tax File Number   | TFN Recorded                |
| <b>INDIVIDUAL NAME</b>  |                             |
| Title   | Mr                          |
| Given name  | Daryle                      |
| Other given names   | Shane                       |
| Family name   | Swarz                       |
| Suffix  |                             |
| Date of birth   | 29 Oct 1977                 |
| Date of death   |                             |
| <b>CONTRIBUTIONS</b>  |                             |
| Opening account balance   | \$371,560.41                |
| Employer contributions  | <b>A</b> \$25,334.03        |
| Principal Employer ABN  | <b>A1</b>                   |
| Personal contributions  | <b>B</b>                    |
| CGT small business retirement exemption   | <b>C</b>                    |
| CGT small business 15 year exemption  | <b>D</b>                    |
| Personal injury election  | <b>E</b>                    |
| Spouse and child contributions  | <b>F</b>                    |
| Other third party contributions   | <b>G</b>                    |
| Proceeds from primary residence disposal  | <b>H</b>                    |
| Receipt date  | <b>H1</b>                   |
| Assessable foreign superannuation fund amount   | <b>I</b>                    |
| Non-assessable foreign superannuation fund amount   | <b>J</b>                    |
| Transfer from reserve: assessable amount  | <b>K</b>                    |
| Transfer from reserve: non-assessable amount  | <b>L</b>                    |
| Contributions from non-complying funds and previously non-complying funds                     | <b>T</b>                    |
| Any other contributions (including Super Co-contributions and Low Income Super Contributions) | <b>M</b>                    |
| <b>Total Contributions</b>  | <b>N</b> <b>\$25,334.03</b> |

**OTHER TRANSACTIONS**

|  |           |                     |
|--|-----------|---------------------|
| Allocated earnings or losses                       | <b>O</b>  | \$26,049.00         |
| Inward rollovers and transfers                     | <b>P</b>  |                     |
| Outward rollovers and transfers                    | <b>Q</b>  |                     |
| TRIS Count   |           |                     |
| Accumulation phase account balance                 | <b>S1</b> | \$422,943.44        |
| Retirement phase account balance - Non CDBIS       | <b>S2</b> |                     |
| Retirement phase account balance - CDBIS           | <b>S3</b> |                     |
| Accumulation phase value                           | <b>X1</b> |                     |
| Retirement phase value                             | <b>X2</b> |                     |
| Outstanding Limited recourse borrowing arrangement | <b>Y</b>  |                     |
| Lump Sum payment                                   | <b>R1</b> |                     |
| Income stream payment                              | <b>R2</b> |                     |
| <b>Closing account balance</b>                     | <b>S</b>  | <b>\$422,943.44</b> |

**Member 2 — Harper, Rachel (TFN Recorded)**

|   |              |
|---|--------------|
| Account status  | Open         |
| Tax File Number   | TFN Recorded |
| <b>INDIVIDUAL NAME</b>  |              |
| Title   | Ms           |
| Given name  | Rachel       |
| Other given names   |              |
| Family name   | Harper       |
| Suffix  |              |
| Date of birth   | 1 Oct 1978   |
| Date of death   |              |
| <b>CONTRIBUTIONS</b>  |              |
| Opening account balance   | \$75,425.03  |
| Employer contributions  | <b>A</b>     |
| Principal Employer ABN  | <b>A1</b>    |
| Personal contributions  | <b>B</b>     |
| CGT small business retirement exemption   | <b>C</b>     |
| CGT small business 15 year exemption  | <b>D</b>     |
| Personal injury election  | <b>E</b>     |
| Spouse and child contributions  | <b>F</b>     |
| Other third party contributions   | <b>G</b>     |
| Proceeds from primary residence disposal  | <b>H</b>     |
| Receipt date  | <b>H1</b>    |
| Assessable foreign superannuation fund amount   | <b>I</b>     |
| Non-assessable foreign superannuation fund amount   | <b>J</b>     |
| Transfer from reserve: assessable amount  | <b>K</b>     |
| Transfer from reserve: non-assessable amount  | <b>L</b>     |
| Contributions from non-complying funds and previously non-complying funds                     | <b>T</b>     |
| Any other contributions (including Super Co-contributions and Low Income Super Contributions) | <b>M</b>     |
| <b>Total Contributions</b>  | <b>N</b>     |

**OTHER TRANSACTIONS**

|  |           |                    |
|--|-----------|--------------------|
| Allocated earnings or losses                       | <b>O</b>  | \$3,895.12         |
| Inward rollovers and transfers                     | <b>P</b>  |                    |
| Outward rollovers and transfers                    | <b>Q</b>  |                    |
| TRIS Count   |           |                    |
| Accumulation phase account balance                 | <b>S1</b> | \$79,320.15        |
| Retirement phase account balance - Non CDBIS       | <b>S2</b> |                    |
| Retirement phase account balance - CDBIS           | <b>S3</b> |                    |
| Accumulation phase value                           | <b>X1</b> |                    |
| Retirement phase value                             | <b>X2</b> |                    |
| Outstanding Limited recourse borrowing arrangement | <b>Y</b>  |                    |
| Lump Sum payment                                   | <b>R1</b> |                    |
| Income stream payment                              | <b>R2</b> |                    |
| <b>Closing account balance</b>                     | <b>S</b>  | <b>\$79,320.15</b> |

## Worksheets

13 CALCULATION STATEMENT

K PAYG INSTALMENTS RAISED

| Description  | Amount            |
|--------------|-------------------|
| Automatic    | \$1,383.00        |
| <b>Total</b> | <b>\$1,383.00</b> |

Document electronically signed



[www.fusesign.com](http://www.fusesign.com)

## Document Details

|                      |   |
|----------------------|---|
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| Initiator email      | leeza@simmonslivingstone.com.au   |
| Signed by            | Daryle Swarz (daryle111@gmail.com   +61 407 337 809)  |
| System finalisation  | 2024-02-19 15:05 +10:00   |
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## Document Signers

### Signer 1

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