

T1

**VAN DIEMEN SUPERANNUATION FUND**

**General Ledger**

As at 30 June 2022

Transaction Date	Description	Units	Debit	Credit	Balance \$
<b>Contributions (24200)</b>					
<u>(Contributions) Morris, Kerry Marguerite - Accumulation (MORKER00001A)</u>					
06/07/2021	qualelec			1,000.00	1,000.00 CR
03/08/2021	qualelec			1,000.00	2,000.00 CR
31/08/2021	qualelec			1,000.00	3,000.00 CR
28/09/2021	qualelec			1,000.00	4,000.00 CR
26/10/2021	qualelec			1,000.00	5,000.00 CR
23/11/2021	qualelec			1,000.00	6,000.00 CR
21/12/2021	qualelec			1,000.00	7,000.00 CR
01/02/2022	qualelec			1,000.00	8,000.00 CR
15/02/2022	qualelec			1,000.00	9,000.00 CR
15/03/2022	qualelec			1,000.00	10,000.00 CR
04/04/2022	qualelec			1,000.00	11,000.00 CR
24/05/2022	qualelec			1,000.00	12,000.00 CR
08/06/2022	Qualelec super fund contrib			6,000.00	18,000.00 CR
21/06/2022	qualelec			1,000.00	19,000.00 CR
22/06/2022	Qualelec super fund contrib			6,000.00	25,000.00 CR
27/06/2022	Qualelec Super Contribution			2,500.00	27,500.00 CR
30/06/2022	2021 sundry creditor paid personally			4,152.50	31,652.50 CR
30/06/2022	CM fees paid personally			4,152.50	35,805.00 CR
30/06/2022	BAS payments paid personally			1,094.00	36,899.00 CR
30/06/2022	Life insurance premiums paid personally			1,796.17	38,695.17 CR
				<b>38,695.17</b>	<b>38,695.17 CR</b>
<u>(Contributions) Morris, Michael James - Accumulation (MORMIC00001A)</u>					
20/07/2021	qualelec			1,000.00	1,000.00 CR
17/08/2021	qualelec			1,000.00	2,000.00 CR
14/09/2021	qualelec			1,000.00	3,000.00 CR
12/10/2021	qualelec			1,000.00	4,000.00 CR
11/11/2021	qualelec			1,000.00	5,000.00 CR
07/12/2021	qualelec			1,000.00	6,000.00 CR
04/01/2022	qualelec			1,000.00	7,000.00 CR
18/01/2022	qualelec			1,000.00	8,000.00 CR
01/03/2022	qualelec			1,000.00	9,000.00 CR
29/03/2022	qualelec			1,000.00	10,000.00 CR
12/04/2022	qualelec			1,000.00	11,000.00 CR
10/05/2022	qualelec			1,000.00	12,000.00 CR
07/06/2022	qualelec			1,000.00	13,000.00 CR
15/06/2022	Qualelec super fund contrib			6,000.00	19,000.00 CR
27/06/2022	Qualelec Super Contribution			2,500.00	21,500.00 CR
29/06/2022	Qualelec super fund contrib			6,000.00	27,500.00 CR
30/06/2022	2021 sundry creditor paid personally			4,152.50	31,652.50 CR
30/06/2022	CM fees paid personally			4,152.50	35,805.00 CR
30/06/2022	BAS payments paid personally			1,094.00	36,899.00 CR
30/06/2022	Life insurance premiums paid personally			1,796.17	38,695.17 CR
				<b>38,695.17</b>	<b>38,695.17 CR</b>

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

T2

## Section A: Your details

### 1 Tax file number (TFN)

PROVIDED

**!** 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: MRS

Family name  
MORRIS

First given name  
KERRY MARGUERITE

Other given names

3 Date of birth PROVIDED

### 4 Current postal address

620 DIDDILLIBAH ROAD

Suburb/town/locality  
DIDDILLIBAH

State/territory  
QLD  
(Australia only)

Postcode  
4559  
(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

## Section B: Super fund's details

### 6 Fund name

VAN DIEMEN SUPERANNUATION FUND

7 Fund Australian business number (ABN) 32110286215

8 Member account number MORKER00001A

9 Unique Superannuation Identifier (USI) (if known)

## Section C: Contribution details

T3

### 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

**➔** 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 \$

**Declaration**

This form has a declaration where you sign to indicate that 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.

**!** Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to **reduce** the amount stated in that notice.

**VARIATION OF PREVIOUS VALID NOTICE OF INTENT**

*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 yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, **or**
- the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

*I declare that I wish to vary my previous valid notice for these contributions by **reducing** the amount I advised in my previous notice and I confirm that either:*

- I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, **or**

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

Name (Print in BLOCK LETTERS)

**Signature**

Date

**➤** Send your completed variation 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.

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

TS

## Section A: Your details

### 1 Tax file number (TFN)

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### 2 Name

Title: MR

Family name MORRIS

First given name MICHAEL JAMES

Other given names

3 Date of birth PROVIDED

### 4 Current postal address

620 DIDDILLIBAH ROAD

Suburb/town/locality DIDDILLIBAH

State/territory QLD  
(Australia only)

Postcode 4559  
(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

## Section B: Super fund's details

### 6 Fund name

VAN DIEMEN SUPERANNUATION FUND

7 Fund Australian business number (ABN) 32110286215

8 Member account number MORMIC00001A

9 Unique Superannuation Identifier (USI) (if known)

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T6

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*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

**➤** 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.

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TT

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- 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 declare that I wish to vary my previous valid notice for these contributions by **reducing** the amount I advised in my previous notice and I confirm that either:*

- I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, **or**

- I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, **or**
- the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

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

Name (Print in BLOCK LETTERS)

Signature

Date

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