

### Electronic Lodgment Declaration (SMSF)

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.

#### 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 However, you cannot lodge your tax return electronically if you do not quote your TFN.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.

Tax File Number	Name of Fund	Year
729999341	Poulson Family Superannuation Fund	2022

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 provided to the agent for the preparation of this tax return, including any applicable schedules is true and correct; and
  - I authorise the agent to lodge this tax return.

Signature of Partner, Trustee, or Director

*JM Poulson*

Date

03/04/23

### 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	MacquarieCashManagem	
Account Number	182512 960894954	Client Reference
		POULSON31593

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

Signature

*JM Poulson*

Date

03/04/23

## Tax Agent's Declaration

I declare that:

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

Agent's signature

*Felicity White*  
Felicity White Apr 12, 2023 11:48 GMT+10

Date

Apr 12, 2023

Contact name

White Felicity

Client Reference

POULSON31593

Agent's Phone Number

1300229178

Tax Agent Number

26071945

# Poulson Family Superannuation Fund Trustees Declaration

The trustees have determined that the Fund is not a reporting entity and that these special purpose financial statements should be prepared in accordance with the accounting policies described in Note 1 to the financial statements.

The trustees declare that:

- (i) the financial statements and notes to the financial statements for the year ended 30 June 2022 present fairly, in all material respects, the financial position of the Superannuation Fund at 30 June 2022 and the results of its operations for the year ended on that date in accordance with the accounting policies described in Note 1 to the financial statements;
- (ii) the financial statements and notes to the financial statements have been prepared in accordance with the requirements of the trust deed; and
- (iii) the operation of the superannuation fund has been carried out in accordance with its trust deed and in compliance with the requirements of the Superannuation Industry (Supervision) Act 1993 and associated Regulations during the year ended 30 June 2022.

Signed in accordance with a resolution of the trustees by:



.....  
John Poulson

Trustee



.....  
Valerie Poulson

Trustee

27 February 2023

**Poulson Family Superannuation Fund**  
**Members Statement**

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**Trustee's Disclaimer**

This statement has been prepared by the Trustee for the member whose name appears at the top of this statement. Every effort has been made by the Trustee to ensure the accuracy and completeness of this Statement. The Trustee does not accept any liability for any error, omission or misprint. All amounts shown in relation to benefits do not take into account any amounts which may be withheld to satisfy the requirements imposed by the Income Tax Assessment Act 1936.

Signed by all the trustees of the fund



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John Poulson  
Trustee



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Valerie Poulson  
Trustee



Australian Government  
Australian Taxation Office

**Agent** SUPERANNUATION  
PROFESSIONALS PTY LTD  
**Client** THE POULSON FAMILY  
SUPERANNUATION FUND  
**ABN** 65 325 272 675

## Print activity statement

Account	Period	Document ID	GST accounting method
Activity statement – 001 – THE POULSON FAMILY SUPERANNUATION FUND	Jul 2021 – Jun 2022	47701332797	Cash

**Payment due date** 15 May 2023

## Statement summary

Description	Reported Value	Owed to ATO	Owed by ATO
<b>Goods and services tax (GST)</b>			
1A Owed to ATO		\$0.00	
1B Owed by ATO			\$878.00
G1 Total sales	\$0.00		
Does this include GST?	Yes		
1H Owed by ATO			\$0.00

## Refund amount

\$878.00

This amount is refundable (it may be offset against any other tax debt).

## Declaration

- > I THE POULSON FAMILY SUPERANNUATION FUND authorise SUPERANNUATION PROFESSIONALS PTY LTD to give the Jul 2021 – Jun 2022 activity statement to the Commissioner of Taxation for 001 – THE POULSON FAMILY SUPERANNUATION FUND.
- > I declare that the information provided for the preparation of this activity statement is true and correct.
- > I am authorised to make this declaration.

Signed: AM Poulson

Date: 03/04/2023



**Section K: Declarations**

 Penalties may be imposed for false or misleading information in addition to penalties relating to any tax shortfalls.

**Important**

Before making this declaration check to ensure that 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 leave labels blank, you will have specified a zero amount or the label was not applicable to you. 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 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 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 or director contact details:**

Title: Mr  Mrs  Miss  Ms  Other

Family name

**Poulson**

First given name

**John**

Other given names


Phone number

Email address

Non-individual trustee name (if applicable)

ABN of non-individual trustee

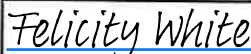
Time taken to prepare and complete this annual return  Hrs

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

**TAX AGENT'S DECLARATION:**

I declare that the *Self-managed superannuation fund annual return 2022* has been prepared in accordance with information provided by the trustees, that the trustees have given me a declaration stating that the information provided to me is true and correct, and that the trustees have authorised me to lodge this annual return.

Tax agent's signature



[Felicity White \(Apr 12, 2023 11:48 GMT+10\)](#)

Date  /

**Tax agent's contact details**

Title: Mr  Mrs  Miss  Ms  Other

Family name

**Felicity**

First given name

**White**

Other given names

Tax agent's practice

**CONNECTUS TAX PTY LTD**

Tax agent's phone number

**1300229178**

Reference number

**POULSON31593**

Tax agent number

**26071945**

Tax File Number **Taxpayer's declaration**

**!** If the schedule is not lodged with the income tax return you are required to sign and date the schedule.

**Important**

Before making this declaration check to ensure that all the information required has been provided on this form and any attachments to this form, and that the information provided 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 ATO. The income tax law imposes heavy penalties for false or misleading statements.

**Privacy**

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

*I declare that the information on this form is true and correct.*

Signature

Date

Day

Month

Year

Contact name

Daytime contact number (include area code)



- making accounting estimates that are reasonable in the circumstances.
- As part of our audit process, we will request from the trustees written confirmation concerning representations made to us in connection with the audit.

**Other Matters under the *Corporations Act 2001***

*Independence*

We confirm that, to the best of our knowledge and belief, we currently meet the independence requirements of the *Corporations Act 2001* in relation to the audit of the financial report. In conducting our audit of the financial report, should we become aware that we have contravened the independence requirements of the *Corporations Act 2001*, we shall notify you on a timely basis.

We look forward to your full cooperation and make available to us whatever records, documentation and other information we request in connection with our audit.

Please sign and return the attached copy of this letter to indicate that it is in accordance with your understanding of the arrangements for our audit of the financial report.

Yours faithfully,

.....  
A.W. Boys  
SMSF Auditor 100014140  
Dated

Acknowledged on behalf of, Poulson Family Superannuation Fund by



.....  
John Poulson  
Trustee

Dated 03/04/2023

**Disqualified person not to act as a Trustee**

There is no reason why any Trustee should be prohibited from acting as a Trustee of this Superannuation Fund.

**Information to Members**

Information relating to the transactions and activities of the Fund has been supplied in a timely manner.

**Meetings**

Meetings have been conducted in accordance with the Trust Deed and the requirements of the SIS Act. Resolutions and issues on which the Trustee(s) have voted, or on which they were required to vote have been passed by at least a 2/3rds majority of the Trustees.

**Subsequent Events**

Since the end of the financial year stated in the Financial Statements till the date of this letter, there have been no events or transactions that would have a material effect upon the Fund either financially or operationally.

Yours faithfully



John Poulson



Valerie Meryl Poulson

**Poulson Family Superannuation Fund**  
**Members Statement**

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**Trustee's Disclaimer**

This statement has been prepared by the Trustee for the member whose name appears at the top of this statement. Every effort has been made by the Trustee to ensure the accuracy and completeness of this Statement. The Trustee does not accept any liability for any error, omission or misprint. All amounts shown in relation to benefits do not take into account any amounts which may be withheld to satisfy the requirements imposed by the Income Tax Assessment Act 1936.

Signed by all the trustees of the fund



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John Poulson  
Trustee



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Valerie Poulson  
Trustee

# Memorandum of Resolutions of

John Poulson and Valerie Poulson  
ATF Poulson Family Superannuation Fund

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**CLOSURE:**

Signed as a true record –



.....  
John Poulson  
27 February 2023



.....  
Valerie Poulson  
27 February 2023

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# Poulson SF - 2022 Declarations

Final Audit Report

2023-04-12

Created:	2023-04-12
By:	Racquel Fraser (advice@finprof.com.au)
Status:	Signed
Transaction ID:	CBJCHBCAABAAxgB7QDWjoVClqRtB3g9v2J6gFfmd7zM

## "Poulson SF - 2022 Declarations" History

-  Document created by Racquel Fraser (advice@finprof.com.au)  
2023-04-12 - 1:47:05 AM GMT- IP address: 124.177.225.144
-  Document emailed to f.white@connectusaccountants.com.au for signature  
2023-04-12 - 1:47:52 AM GMT
-  Email viewed by f.white@connectusaccountants.com.au  
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-  Signer f.white@connectusaccountants.com.au entered name at signing as Felicity White  
2023-04-12 - 1:48:35 AM GMT- IP address: 139.218.117.210
-  Document e-signed by Felicity White (f.white@connectusaccountants.com.au)  
Signature Date: 2023-04-12 - 1:48:37 AM GMT - Time Source: server- IP address: 139.218.117.210
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2023-04-12 - 1:48:37 AM GMT

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