

SMSF Tax Return

2022

1 Jul 2021—30 Jun 2022

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 However, you cannot lodge your tax return electronically if you do not quote your TFN.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

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) 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.

<u>Tax File Number</u>	<u>Name of partnership, trust, fund or entity</u>	<u>Year</u>
TFN Recorded	Arveti Family Superfund	2022

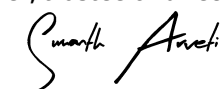
I authorise my tax agent to electronically transmit this tax return via the electronic lodgment service.

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 	Date 28 Mar 2023
--	---------------------

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
25578668	063765	10737905	SOWMYA ARVETI AND ARVETI VENKATA

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


Signature 	Date 28 Mar 2023
--	---------------------

PART D TAX AGENTS CERTIFICATE (SHARED FACILITIES USERS ONLY)

Client Ref	Agent Ref No.	Contact Name	Contact No.
ARVE0001	25578668	Trident Financial Group Pty Ltd	0398994036

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.

Agent's Signature 	Date 28 Mar 2023
--	---------------------

Section A: Fund information

Period start				01/07/2021
Period end				30/06/2022
1 TAX FILE NUMBER				TFN Recorded
2 NAME OF SELF-MANAGED SUPERANNUATION FUND (SMSF)				Arveti Family Superfund
3 AUSTRALIAN BUSINESS NUMBER				73 237 714 930
4 CURRENT POSTAL ADDRESS				
Address	Town/City	State	Postcode	
C/- Trident Financial Group Pty Ltd PO BOX 165	Canterbury	VIC	3126	
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
SMSF auditor number				100014140
Contact number				61-0410712708
Auditor Address	Town/City	State	Postcode	
Po Box 3376	Rundle Mall	SA	5000	
Was part A of the audit report qualified?				B Yes
Was part B of the audit report qualified?				C No
7 ELECTRONIC FUNDS TRANSFER (EFT)				
A. Fund's financial institution account details				
BSB number				063765
Account number				10737905
Account name				Arveti Family Superfund
I would like my tax refunds made to this account				No
B. Financial institution account details for tax refunds				
BSB number				063765
Account number				10737905
Account name				SOWMYA ARVETI AND ARVETI VENKATA

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

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

Did you have a CGT event during the year?	G	No
Have you applied an exemption or rollover?	M	No

Losses carried forward

Net Capital Losses from Collectables		\$0.00
Other Net Capital Losses		\$0.00
Gross interest income	C	\$8.00
Unfranked dividends	J	\$858.00
Franked dividend income amount	K	\$0.00
Franking credit	L	\$0.00
Tax file number amounts withheld from dividends		\$402.00

Assessable contributions	(R1 + R2 + R3 less R6)	R	\$23,951.00
Assessable employer contributions		R1	\$23,951.00
No-TFN-quoted contributions		R3	\$0.00

Gross income	W	\$24,817.00
Total assessable income	V	\$24,817.00

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

		Deductions	Non-Deductible Expenses
Management and administration expenses	J1	\$259.00	J2
Totals	N	\$259.00	Y
Total SMSF expenses		(N + Y)	Z \$259.00
Taxable income or loss	(TOTAL ASSESSABLE INCOME less TOTAL DEDUCTIONS)		O \$24,558.00

Section D: Income tax calculation statement

13 CALCULATION STATEMENT		
Taxable income		A \$24,558.00
Tax on taxable income		T1 \$3,683.70
Tax on no-TFN-quoted contributions		J \$0.00
Gross tax		B \$3,683.70
Subtotal	(B less C - cannot be less than zero)	T2 \$3,683.70
Subtotal	(T2 less D - cannot be less than zero)	T3 \$3,683.70
REFUNDABLE TAX OFFSETS	(E1 + E2 + E3 + E4)	E \$0.00
Complying fund's franking credits tax offset		E1 \$0.00
Tax Payable		T5 \$3,683.70
Eligible credits	(H1 + H2 + H3 + H5 + H6 + H8)	H \$402.00
Credit for tax withheld - where ABN or TFN not quoted (non-individual)		H3 \$402.00
Tax offset refunds (Remainder of refundable tax offsets)		I \$0.00
PAYG instalments raised		K \$4,396.00
Supervisory levy		L \$259.00
Supervisory levy adjustment for wound up funds		M \$0.00
Supervisory levy adjustment for new funds		N \$0.00
Amount refundable		S \$855.30

Section H: Assets and liabilities

15 ASSETS		
15a Australian managed investments		
Unlisted trusts		B \$118,000.00
15b Australian direct investments		
Cash and term deposits		E \$7,872.00
Listed shares		H \$53,739.00
Other assets		O \$855.00
15d Overseas direct investments		
Total Australian and overseas assets		U \$180,466.00

16 LIABILITIES

Total member closing account balances	W	\$178,269.00
Other liabilities	Y	\$2,197.00
Total liabilities	Z	\$180,466.00

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

Title	Mr
First name	SUMANTH
Other name	KUMAR ARVETI VENKATA
Family name	NAGA
Contact number	61 0421714704
Email address	avnsk@yahoo.com

TAX AGENT'S CONTACT DETAILS

Practice name	Trident Financial Group
Title	Mr
First name	Chin
Family name	He
Contact number	03 98994036

Member 1 — ARVETI, SOWMYA (TFN Recorded)

Account status		Open
Tax File Number		TFN Recorded
INDIVIDUAL NAME		
Title		Ms
Given name		SOWMYA
Other given names		
Family name		ARVETI
Suffix		
Date of birth		16 Oct 1984
Date of death		
CONTRIBUTIONS		
Opening account balance		\$9,999.64
Employer contributions	A	\$5,076.00
Principal Employer ABN	A1	
Personal contributions	B	
CGT small business retirement exemption	C	
CGT small business 15 year exemption	D	
Personal injury election	E	
Spouse and child contributions	F	
Other third party contributions	G	
Proceeds from primary residence disposal	H	
Receipt date	H1	
Assessable foreign superannuation fund amount	I	
Non-assessable foreign superannuation fund amount	J	
Transfer from reserve: assessable amount	K	
Transfer from reserve: non-assessable amount	L	
Contributions from non-complying funds and previously non-complying funds	T	
Any other contributions (including Super Co-contributions and Low Income Super Contributions)	M	\$440.00
Total Contributions	N	\$5,516.00

OTHER TRANSACTIONS

Allocated earnings or losses	O	(\$1,403.79)
Inward rollovers and transfers	P	
Outward rollovers and transfers	Q	
TRIS Count		
Accumulation phase account balance	S1	\$14,111.85
Retirement phase account balance - Non CDBIS	S2	
Retirement phase account balance - CDBIS	S3	
Accumulation phase value	X1	
Retirement phase value	X2	
Outstanding Limited recourse borrowing arrangement	Y	
Lump Sum payment	R1	
Income stream payment	R2	
Closing account balance	S	\$14,111.85

Member 2 — NAGA, SUMANTH KUMAR ARVETI VENKATA (TFN Recorded)

Account status	Open
Tax File Number	TFN Recorded
INDIVIDUAL NAME	
Title	Mr
Given name	SUMANTH
Other given names	KUMAR ARVETI VENKATA
Family name	NAGA
Suffix	
Date of birth	8 Apr 1980
Date of death	
CONTRIBUTIONS	
Opening account balance	\$156,595.72
Employer contributions	A \$18,875.49
Principal Employer ABN	A1
Personal contributions	B
CGT small business retirement exemption	C
CGT small business 15 year exemption	D
Personal injury election	E
Spouse and child contributions	F
Other third party contributions	G
Proceeds from primary residence disposal	H
Receipt date	H1
Assessable foreign superannuation fund amount	I
Non-assessable foreign superannuation fund amount	J
Transfer from reserve: assessable amount	K
Transfer from reserve: non-assessable amount	L
Contributions from non-complying funds and previously non-complying funds	T
Any other contributions (including Super Co-contributions and Low Income Super Contributions)	M
Total Contributions	N \$18,875.49

OTHER TRANSACTIONS

Allocated earnings or losses	O	(\$11,313.87)
Inward rollovers and transfers	P	
Outward rollovers and transfers	Q	
TRIS Count		
Accumulation phase account balance	S1	\$164,157.34
Retirement phase account balance - Non CDBIS	S2	
Retirement phase account balance - CDBIS	S3	
Accumulation phase value	X1	
Retirement phase value	X2	
Outstanding Limited recourse borrowing arrangement	Y	
Lump Sum payment	R1	
Income stream payment	R2	
Closing account balance	S	\$164,157.34

Worksheets

11 INCOME

J Unfranked dividends

Description	TFN Withheld	Unfranked	Franked	Franking Credits
Automatic	\$402.00	\$858.00	\$0.00	\$0.00
Total	\$402.00	\$858.00	\$0.00	\$0.00