

**Trust tax return****2023**

Day Month Year to Day Month Year

	to	
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or specify period if part year or approved substitute period.

RN: 100017663ET

Notes to help you prepare this tax return are provided in the Trust tax return instructions 2023 (the instructions), available on our website [www.ato.gov.au](http://www.ato.gov.au)

**Tax file number (TFN)**

429 124 638

Have you attached any  
'other attachments'?

No

See the Privacy note in the Taxpayer's declaration.

**Name of trust**

The Jarvie Property Trust

**Australian business number (ABN)**

16 198 202 502

**Previous name of trust**

If the trust name has changed, print the previous name exactly as shown on the last notice of assessment or the last tax return lodged.

**Current postal address**

If the address has not changed, print it exactly as shown on the last notice of assessment or the last tax return lodged.

C/- Walker Partners (Aust) Pty Ltd

P O Box 706

Heidelberg

VIC

3084

**Postal address on previous tax return**

If the address has changed, print your previous address exactly as shown on the last notice of assessment or the last tax return lodged.

**Full name of the trustee to whom notices should be sent**

If the trustee is an individual, print details here.

Title-for example, Mr, Mrs, Ms, Miss

Surname or family name   
 Given names

If the trustee is a company, print details here including ABN.

Name   
 ABN

**Daytime contact phone number** Area code  Telephone number

**Family trust election status**

If the trustee has made, or is making, a family trust election, write the four-digit **income year specified** of the election (for example, for the 2022-23 income year write 2023).

If revoking or varying a family trust election, print **R** for revoke or print **V** for variation and complete and attach the Family trust election, revocation or variation 2023.

**Interposed entity election status**

If the trustee has an existing election, write the earliest income year specified. If the trustee is making one or more elections this year, write the earliest income year being specified and complete an Interposed entity election or revocation 2023 for each election.

If revoking an interposed entity election, print **R** and complete and attach the Interposed entity election or revocation 2023.

**Type of trust**

Print the code representing the type of trust.

Print X if also a charity

If code D, write the date of death.

**CCIV sub-fund trusts**

Do you own shares that are referable to a sub-fund within the same CCIV as you?  Print Y for yes or N for no.

**Managed investment trusts**

Is the trust a managed investment trust (MIT)?  Print Y for yes or N for no.

MIT type  CODE

If the trust is a managed investment trust, has the trustee made an election into capital account treatment?  Print Y for yes or N for no.

**Is any tax payable by the trustee?**

Print Y for yes or N for no.

**Final tax return**

**Electronic funds transfer (EFT)**

We need your financial institution details to pay any refund owing to you, even if you have provided them to us before. Write the BSB number, account number and account name below. (See relevant instructions.)

BSB number (must be six digits)

Account number

Account name

**1 Description of main business activity**

Industry code

**2 Status of business** - print X at label **B1**, **B2** or **B3**, whichever is the first applicable option, or leave blank.

Multiple business  Ceased business  Commenced business

Consolidation status - print X at label  if applicable Consolidated subsidiary member

Entity status Significant global entity  Country by country reporting entity

**Income** excluding foreign income

**5 Business income and expenses**

**WHOLE DOLLARS ONLY**

Income	Primary production	Non-primary production	Totals
Gross payments where ABN not quoted <b>C</b>	<input type="text"/>	<b>D</b> <input type="text"/>	<input type="text"/>
Gross payments subject to foreign resident withholding (excluding capital gains)		<b>B</b> <input type="text"/>	<input type="text"/> 0
Assessable government industry payments <b>E</b>	<input type="text"/> / <input type="text"/> CODE	<b>F</b> <input type="text"/> / <input type="text"/> CODE	<input type="text"/>
Other business income <b>G</b>	<input type="text"/> / <input type="text"/>	<b>H</b> <input type="text"/> / <input type="text"/>	<input type="text"/> 0 / <input type="text"/>
<b>Total business income</b>	<input type="text"/> 0 / <input type="text"/>	<input type="text"/> 0 / <input type="text"/>	<input type="text"/> 0 / <input type="text"/>

Expenses			
Foreign resident withholding expenses (excluding capital gains)	<input type="text"/>	<input type="text"/>	<b>P</b> <input type="text"/> 0
Contractor, sub-contractor and commission expenses	<input type="text"/>	<input type="text"/>	<b>C</b> <input type="text"/>
Superannuation expenses	<input type="text"/>	<input type="text"/>	<b>D</b> <input type="text"/>
Cost of sales	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	<b>E</b> <input type="text"/> / <input type="text"/>
Bad debts	<input type="text"/>	<input type="text"/>	<b>F</b> <input type="text"/>
Lease expenses	<input type="text"/>	<input type="text"/>	<b>G</b> <input type="text"/>
Rent expenses	<input type="text"/>	<input type="text"/>	<b>H</b> <input type="text"/>
Total interest expenses	<input type="text"/>	<input type="text"/>	<b>I</b> <input type="text"/>
Total royalty expenses	<input type="text"/>	<input type="text"/>	<b>J</b> <input type="text"/>
Depreciation expenses	<input type="text"/>	<input type="text"/>	<b>K</b> <input type="text"/>
Motor vehicle expenses	<input type="text"/>	<input type="text"/>	<b>L</b> <input type="text"/>
Repairs and maintenance	<input type="text"/>	<input type="text"/>	<b>M</b> <input type="text"/>
All other expenses	<input type="text"/>	<input type="text"/>	<b>N</b> <input type="text"/>
<b>Total expenses - labels P to N</b>	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	<b>O</b> <input type="text"/> 0 / <input type="text"/>

Reconciliation items			
<b>Add:</b> Income reconciliation adjustments	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	<b>A</b> <input type="text"/> / <input type="text"/>
<b>Add:</b> Expense reconciliation adjustments	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	<b>B</b> <input type="text"/> / <input type="text"/>
<b>Net income or loss from business</b>	<b>Q</b> <input type="text"/> / <input type="text"/>	<b>R</b> <input type="text"/> / <input type="text"/>	<b>S</b> <input type="text"/> 0 / <input type="text"/>
Net small business income	<b>V</b> <input type="text"/>		

**6 Tax withheld**

Tax withheld where ABN not quoted **T**

Credit for tax withheld - foreign resident withholding (excluding capital gains) **U**

**8 Partnerships and trusts****Primary production**Distribution from partnerships **A**  / Share of net income from trusts **Z**  / Deductions relating to amounts shown at **A** and **Z** **S** Net primary production amount  / **Non-primary production**Distribution from partnerships,  
less foreign income **B**  / Share of net income from trusts, less capital  
gains, foreign income and franked distributions **R**  / Deductions relating to amounts shown at **B** and **R** **T** Franked distributions from trusts **F** Deductions relating to franked  
distributions from trusts in label **F** **G** Net non-primary  
production amount  / Capital gains from another trust and net foreign capital gains need to be included at item 21.  
Amounts of foreign income must be included at item 22 or 23.**Share of credits from income** Share of credit for tax withheld  
where ABN not quoted **C** Share of franking credit from  
franked distributions **D** Share of credit for TFN amounts withheld from  
interest, dividends and unit trust distributions **E** Credit for TFN amounts withheld from  
payments from closely held trusts **O** Share of credit for tax withheld  
- foreign resident withholding  
(excluding capital gains) **U** **9 Rent**Gross rent **F**  44,230Interest deductions **G**  0Capital works deductions **X**  0Other rental deductions **H**  9,759Net rent  34,471 / **10 Forestry managed investment scheme income****Q** **11 Gross interest** - including Australian Government loan interest**J**  7,389TFN amounts withheld from gross interest **I**  0.00**12 Dividends**Unfranked amount **K**  0Franked amount **L**  0Franking credit **M**  0TFN amounts withheld from dividends **N**  0.00

**13 Superannuation lump sums and employment termination payments**

Death benefit superannuation lump sum where the beneficiary is a non-dependant	Taxed element	<b>V</b>	<input type="text"/>
	Untaxed element	<b>W</b>	<input type="text"/>
Death benefit employment termination payment where the beneficiary is a dependant	Taxable component	<b>X</b>	<input type="text"/>
Death benefit employment termination payment where the beneficiary is a non-dependant	Taxable component	<b>Y</b>	<input type="text"/>

**14 Other Australian income - give details**

Type of income	Excepted net income	<input type="text"/>	<b>O</b>	<input type="text"/>	/	<input type="text"/>
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**15 Total of items 5 to 14**

Add the boxes  /

**Deductions**

**16 Deductions relating to:**

Australian investment income **P**

Deductions relating to franked distributions should not include deductions included at G item 8

Franked distributions **R**

**17 Forestry managed investment scheme deduction**

**D**

**18 Other deductions - show only deductions not claimable at any other item**

Name of each item of deduction	Amount
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Q**

**19 Total of items 16 to 18**

**20 Net Australian income or loss - other than capital gains**

Subtract item 19 from item 15. **\$**  /

**Capital gains**

**21 Capital gains**

Do you need to complete a *Capital gains tax (CGT) Schedule 2023*?

Did you have a CGT event during the year? **G**  Answer yes at **G** if the trust had an amount of capital gains from another trust. or Code

Have you applied an exemption or rollover? **M**  Type Y for yes N for no.

Net capital gain **A**

Credit for foreign resident capital gains withholding amounts **B**

### Foreign income

#### 22 Attributed foreign income

Did you have overseas branch operations or a direct or indirect interest in a foreign trust, foreign company, controlled foreign entity or transferor trust?

**S**  **N** Print Y for yes or N for no.

Listed country  **M**

Unlisted country  **X**

If you answered Yes at label **S**, complete and attach an *International dealings schedule 2023*. Do you need to complete a *Losses schedule 2023*?

#### 23 Other assessable foreign source income - other than income shown at item 22

Also include at label **D** Australian franking credits from a New Zealand franking company that you have received indirectly through a partnership or trust.

Gross  **B**  Net  **V**  /   
Foreign income tax offset  **Z**

Australian franking credits from a New Zealand franking company  **D**

**24 Total of items 20 to 23** Add the  boxes  /

### Tax losses deducted

**25 Tax losses deducted**  **C**

**26 Total net income or loss** Subtract item 25 from item 24.  /

### Losses information

#### 27 Losses information

A *Losses Schedule 2023* must also be completed and attached if the sum of labels **U** and **V** is greater than \$100,000 or if the trust is a listed widely held trust and failed the majority ownership test for a loss.

Tax losses carried forward to later income years  **U**   
Net capital losses carried forward to later income years  **V**

### Landcare and water facility tax offset

**28 Landcare and water facility tax offset** Landcare and water facility tax offset brought forward from prior years  **G**

**Overseas transactions / thin capitalisation****29 Overseas transactions**

Was the aggregate amount of your transactions or dealings with international related parties (including the value of any property/service transferred or the balance of any loans) greater than \$2 million?

**W**  **N**  Print Y for yes or N for no.

Did the thin capitalisation provisions affect you? **O**  **N**  Print Y for yes or N for no.

Interest expenses overseas **D**

Royalty expenses overseas **E**

If you answered Yes at label W or O or completed D or E, complete and attach the *International dealings schedule 2023*.

Was any beneficiary who was not a resident of Australia at any time during the income year, 'presently entitled' to a share of the income of the trust?

**A**  **N**  Print Y for yes or N for no.

If you answered Yes at label A, attach the information requested in the instructions.

**Transactions with specified countries**

Did you directly or indirectly send to, or receive from, one of the countries specified in the instructions, any funds or property or

Do you have the ability or expectation to control, whether directly or indirectly, the disposition of any funds, property, assets or investments located in, or located elsewhere but controlled or managed from one of those countries?

**C**  **N**  Print Y for yes or N for no.

**Personal services income****30 Personal services income**

Does your income include an individual's personal services income (PSI)? **N**  **N**  Print Y for yes or N for no.

Total amount of PSI included at item 5 income labels **A**

Total amount of deductions against PSI included at item 5 expense labels **B**

Did you satisfy the results test in respect of any individual? **C**  Print Y for yes or N for no.

Do you hold a personal services business (PSB) determination in respect of any individual? **D**  Print Y for yes or N for no.

For any individual for whom you did not satisfy the results test or hold a PSB determination, and each source of their PSI income yielded less than 80% of their total PSI, indicate if you satisfied any of the following personal services business tests - print **X** in the appropriate box(es).

Unrelated clients test **E1**  Employment test **E2**  Business premises test **E3**

**Taxation of financial arrangements****31 Taxation of financial arrangements (TOFA)**

Total TOFA gains **M**

Total TOFA losses **N**

**Non-concessional MIT income**

**32 Non-Concessional MIT Income (NCMI)**

**Business income**

**Primary production**

Non-concessional MIT Income (NCMI) **A**

Excluded from NCMI **B**

Amounts shown at A and B must also be included at 5G PP – Other business income.

**Non-Primary production**

Non-concessional MIT Income (NCMI) **C**

Excluded from NCMI **D**

Amounts shown at C and D must also be included at 5H Non-PP – Other business income.

**Partnerships and trusts**

**Primary production**

Non-concessional MIT Income (NCMI) **E**

Excluded from NCMI **F**

Amounts shown at E and F must also be included at 8A Distribution from partnerships.

Non-concessional MIT Income (NCMI) **G**

Excluded from NCMI **H**

Amounts shown at G and H must also be included at 8Z Share of net income from trusts.

**Non-Primary production**

Non-concessional MIT Income (NCMI) **I**

Excluded from NCMI **J**

Amounts shown at I and J must also be included at 8B Distribution from partnerships, less foreign income.

Non-concessional MIT Income (NCMI) **K**

Excluded from NCMI **L**

Amounts shown at K and L must also be included at 8R Share of net income from trusts, less capital gains, foreign income and franked distributions.

**Capital gains**

NCMI **X**

Excluded from NCMI **Z**

The amounts shown at labels X and Z must be included in the calculation of the amount at 21A Net capital gain.



**Key financial information**

- 33 All current assets **F**
- 34 Total assets **G**
- 35 All current liabilities **I**
- 36 Total liabilities **J**

**Business and professional items**

37 Business name of main business


38 Business address of main business

<b>A</b>

- |  |  |   |  |
|--|--|---|--|
| 39 Opening stock <b>C</b>                  | <input type="text"/>                                     | 45 Payments to associated persons <b>M</b>                  | <input type="text"/>                                     |
| 40 Purchases and other costs <b>B</b>      | <input type="text"/>                                     | 46 Fringe benefit employee contributions <b>T</b>           | <input type="text"/>                                     |
| 41 Closing stock <b>D</b>                  | <input type="text"/> / <input type="text" value="CODE"/> | 47 Unpaid present entitlement to a private company <b>Y</b> | <input type="text"/> / <input type="text" value="CODE"/> |
| 42 Trade debtors <b>E</b>                  | <input type="text"/>                                     | 48 Trading stock election <input type="checkbox"/>          | Print Y for yes or leave blank.                          |
| 43 Trade creditors <b>H</b>                | <input type="text"/>                                     | 49 Aggregated turnover                                      | <b>P</b> <input type="text"/> (select range A to P)      |
| 44 Total salary and wage expenses <b>L</b> | <input type="text"/> / <input type="text" value="CODE"/> | Select your aggregated turnover range                       |  |
|  |  | Aggregated turnover   | <b>Q</b> <input type="text"/>                            |

**50 Capital allowances****Depreciating assets first deducted in this income year**Intangible depreciating assets first deducted **A** Other depreciating assets first deducted **B** Have you self-assessed the effective life of any of these assets? **C**  Print **Y** for yes or **N** for no.Are you making a choice to opt out of temporary full expensing for some or all of your eligible assets? **P**  (A – Some eligible assets; B – All eligible assets)Number of assets you are opting out for **Q** Value of assets you are opting out for **R** Temporary full expensing deductions **S** Number of assets you are claiming for **T** 

If you complete S and T, you must also complete item 49P Select your aggregated turnover range.

**For all depreciating assets**Did you recalculate the effective life for any of your assets this income year? **D**  Print **Y** for yes or **N** for no.Total adjustable values at end of income year **E** Assessable balancing adjustments on the disposal of intangible depreciating assets **F** Deductible balancing adjustments on the disposal of intangible depreciating assets **G** Termination value of intangible depreciating assets **H** Termination value of other depreciating assets **I** Subsequent year accelerated depreciation deductions for assets using Backing business investment **N** Deduction for project pool **J** Section 40-880 deduction **K** Landcare operations and deduction for decline in value of water facility, fencing asset and fodder storage asset **L** **51 Small business entity simplified depreciation**Deduction for certain assets **A** Deduction for general small business pool **B** **52 Small business boost**Small business skills and training boost **A** Small business technology investment boost **B**

**Tax offsets**

**53 National rental affordability scheme** National rental affordability scheme tax offset entitlement **F**

**54 Other refundable tax offsets** **G**  /

**55 Non-refundable carry forward tax offsets** Early stage venture capital limited partnership tax offset **H**

Early stage investor tax offset **I**

**Medicare levy reduction or exemption****56 Medicare levy reduction or exemption**

Spouse's 2022-23 taxable income - if nil write '0' **A**

Number of dependent children and students **B**

Full Medicare levy exemption - number of days **C**  /  CODE

Half Medicare levy exemption - number of days **D**

**Medicare levy surcharge and private health insurance tax offset**

If the trust is liable for the Medicare levy surcharge or entitled to the private health insurance tax offset, refer to the instructions.

**Income of the trust estate**

**57 Income of the trust estate** **A**

**Statement of distribution****58 Statement of distribution****Distribution details**

Complete the distribution details on the following pages for BENEFICIARY 1 to 3 if required, and for Income to which no beneficiary is presently entitled and in which no beneficiary has an indefeasible vested interest, and the trustee's share of credit for tax deducted, if it applies.

If there are more than three beneficiaries see the instructions for more information.

**Note:** It is not an offence not to quote a TFN for a beneficiary. However, TFNs help the Tax ATO to correctly identify each beneficiary's tax records. The ATO is authorised by the Income Tax Assessment Act 1936 and the Income Tax Assessment Act 1997 to ask for information in this tax return. We need this information to help administer the tax laws. To make a correct Trustee Beneficiary (TB) statement you must quote the TFN of a resident trustee beneficiary of a closely held trust.

**Note:** If the trust needs to provide annual reports under the Trustee Beneficiary Rules or the TFN withholding rules you will be able to do so by completing the information in the statement of distribution.

58 Statement of distribution - continued

Beneficiary's name and tax file number or postal address

Distribution Fraction   %

Tax file number

Date of birth

See the Privacy note in the Taxpayer's declaration.

Name

Address

Assessment calculation code   Entity code   Share of credit for TFN amounts withheld from payments from closely held trusts

Share of income of the trust estate

Capital gains

Share of credit for tax withheld - foreign resident withholding (excluding capital gains)

NCMI capital gains

Australian franking credits from a New Zealand franking company

Excluded from NCMI capital gains

Primary production  /

Share of credit for foreign resident capital gains withholding amounts

PP-NCMI

Attributed foreign income

PP - Excluded from NCMI

Other assessable foreign source income  /

Non-primary production   /

Foreign income tax offsets

Non-PP-NCMI

Share of National rental affordability scheme tax offset

Non-PP - Excluded from NCMI

Exploration credits distributed

Credit for tax withheld where ABN not quoted

Early stage venture capital limited partnership tax offset

Franked distributions

Early stage investor tax offset

Franking credit

Div 6AA Eligible income

TFN amounts withheld

Small business income tax offset information

Share of net small business income

Non-resident beneficiary additional information

s98(3) assessable amount

s98(4) assessable amount

TB statement information

For each trustee beneficiary, indicate whether you will be making a TB statement:

TB statement?  Print Y for yes or N for no.

Tax preferred amounts

Untaxed part of share of net income

Annual Trustee Payment report information

Distribution from ordinary or statutory income during income year

Total TFN amounts withheld from payments

**58 Statement of distribution - continued**

Beneficiary's name and tax file number or postal address

Distribution Fraction   %

Tax file number

Date of birth

See the Privacy note in the Taxpayer's declaration.

Name

Address

Assessment calculation code

Entity code

Share of credit for TFN amounts withheld from payments from closely held trusts

Share of income of the trust estate

Capital gains

Share of credit for tax withheld – foreign resident withholding (excluding capital gains)

NCMI capital gains

Australian franking credits from a New Zealand franking company

Excluded from NCMI capital gains

Primary production

Share of credit for foreign resident capital gains withholding amounts

PP–NCMI

Attributed foreign income

PP – Excluded from NCMI

Other assessable foreign source income

Non-primary production

Foreign income tax offsets

Non-PP–NCMI

Share of National rental affordability scheme tax offset

Non-PP – Excluded from NCMI

Exploration credits distributed

Credit for tax withheld where ABN not quoted

Early stage venture capital limited partnership tax offset

Franked distributions

Early stage investor tax offset

Franking credit

Div 6AA Eligible income

TFN amounts withheld

**Small business income tax offset information**

Share of net small business income

**Non-resident beneficiary additional information**

s98(3) assessable amount

s98(4) assessable amount

**TB statement information**

For each trustee beneficiary, indicate whether you will be making a TB statement:

TB statement?  Print Y for yes or N for no.

Tax preferred amounts

Untaxed part of share of net income

**Annual Trustee Payment report information**

Distribution from ordinary or statutory income during income year

Total TFN amounts withheld from payments

58 Statement of distribution - continued

Beneficiary's name and tax file number or postal address

Distribution Fraction   %

Tax file number

Date of birth

See the Privacy note in the Taxpayer's declaration.

Name

Address

Assessment calculation code   Entity code   Share of credit for TFN amounts withheld from payments from closely held trusts

Share of income of the trust estate

Capital gains

Share of credit for tax withheld - foreign resident withholding (excluding capital gains)

NCMI capital gains

Australian franking credits from a New Zealand franking company

Excluded from NCMI capital gains

Primary production

Share of credit for foreign resident capital gains withholding amounts

PP-NCMI

Attributed foreign income

PP - Excluded from NCMI

Other assessable foreign source income

Non-primary production

Foreign income tax offsets

Non-PP-NCMI

Share of National rental affordability scheme tax offset

Non-PP - Excluded from NCMI

Exploration credits distributed

Credit for tax withheld where ABN not quoted

Early stage venture capital limited partnership tax offset

Franked distributions

Early stage investor tax offset

Franking credit

Div 6AA Eligible income

TFN amounts withheld

Small business income tax offset information

Share of net small business income

Non-resident beneficiary additional information

s98(3) assessable amount

s98(4) assessable amount

TB statement information

For each trustee beneficiary, indicate whether you will be making a TB statement:

TB statement?  Print Y for yes or N for no.

Tax preferred amounts

Untaxed part of share of net income

Annual Trustee Payment report information

Distribution from ordinary or statutory income during income year

Total TFN amounts withheld from payments

**58 Statement of distribution - continued**

**Income to which no beneficiary is presently entitled and in which no beneficiary has an indefeasible vested interest, and the trustee's share of credit for tax deducted.**

Assessment calculation code	<b>V</b> <input type="text"/>	Share of credit for TFN amounts withheld from payments from closely held trusts	<b>O</b> <input type="text"/>
Share of income of the trust estate	<b>W</b> <input type="text"/>	Capital gains	<b>F</b> <input type="text"/>
Share of credit for tax withheld – foreign resident withholding (excluding capital gains)	<b>L</b> <input type="text"/>	NCMI capital gains	<b>F1</b> <input type="text"/>
Australian franking credits from a New Zealand franking company	<b>N</b> <input type="text"/>	Excluded from NCMI capital gains	<b>F2</b> <input type="text"/>
Share of income	Primary production	<b>A</b> <input type="text"/>	Share of credit for foreign resident capital gains withholding amounts
	PP–NCMI	<b>A1</b> <input type="text"/>	Attributed foreign income
	PP–Excluded from NCMI	<b>A2</b> <input type="text"/>	Other assessable foreign source income
	Non-primary production	<b>B</b> <input type="text"/>	Foreign income tax offset
	Non-PP–NCMI	<b>B1</b> <input type="text"/>	Share of National rental affordability scheme tax offset
	Non-PP–Excluded from NCMI	<b>B2</b> <input type="text"/>	Share of other refundable tax offsets
	Credit for tax withheld where ABN not quoted	<b>C</b> <input type="text"/>	Early stage venture capital limited partnership tax offset
	Franked distributions	<b>U</b> <input type="text"/>	Early stage venture capital limited partnership tax offset carried forward from previous year
	Franking credit	<b>D</b> <input type="text"/>	Early stage investor tax offset
	TFN amounts withheld	<b>E</b> <input type="text"/>	Early stage investor tax offset carried forward from previous year

If you completed labels T, K, J or M, attach the information requested in the instructions.

**59 Choice for resident trustee to be assessed to capital gains on behalf of beneficiaries**

Assessment calculation code **X**

Amount of capital gains on which the trustee has chosen to be assessed on behalf of beneficiaries **Y**

**Items 60 and 61 must be answered for all trusts - if you answer yes to any of these questions, answer Yes to the 'other attachments' question on page 1 of this tax return.**

**60 Beneficiary under legal disability who is presently entitled to income from another trust**

Was any beneficiary in this trust, who was under a legal disability on 30 June 2023, also presently entitled to a share of the income of another trust?

N Print Y for yes or N for no.

If yes, or the answer is not known, furnish the information requested in the instructions.

**61 Non-resident trust**

Is the trust a non-resident trust?  N Print Y for yes or N for no.

If yes, state the amount of income derived outside Australia to which no beneficiary is presently entitled. Print NIL if applicable.

**Declarations**

**TAXPAYER'S DECLARATION**

**Important**

Before making this declaration check to ensure that all income has been disclosed and the tax 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 tax return, place all the facts before the ATO. The income tax law imposes heavy penalties for false or misleading statements in tax returns. **This declaration must be signed by a trustee or public officer.**

**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 beneficiary in our records. It is not an offence not to provide the TFNs. However, if the TFNs are not provided, it could increase the chance of delay or error in each beneficiary's assessment.

Taxation law authorises the ATO to collect information including personal information about the person authorised to sign the declaration. For information about your privacy go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

**DECLARATION:**

I declare that the information on this tax return, including any attached schedules and additional documentation is true and correct.

Signature

Day Month Year

Date

Hours taken to prepare and complete this tax return

1

**TAX AGENT'S DECLARATION**

I,

declare that this tax return has been prepared in accordance with information supplied by the taxpayer, that the taxpayer has given me a declaration stating that the information provided to me is true and correct and that the taxpayer has authorised me to lodge the tax return.

Agent's signature

Client's reference

JAR832C

Contact name

Pablo Loriente

Date

Day Month Year

09/11/2023

Agent's phone number (include area code)

Area code

03

Telephone number

84146700

Agent's reference number

55610000

Office use only

Indics X