

N DEFTEROS DENTAL PTY LTD SUPERANNUATION FUND



Contributions Breakdown Report

For The Period 01 July 2020 - 30 June 2021

Summary

Member	D.O.B	Age (at 30/06/2020)	Total Super Balance (at 30/06/2020) *1	Concessional	Non-Concessional	Other	Reserves	Total
Defteros, Anastasia	Provided	27	96,610.24	15,000.00	0.00	0.00	0.00	15,000.00
Defteros, Connor	Provided	23	101,276.44	23,000.00	0.00	117.35	0.00	23,117.35
Defteros, Katrina Patricia	Provided	51	737,216.90	24,190.93	0.00	0.00	0.00	24,190.93
Defteros, Nicholas Constantine	Provided	58	1,151,575.28	25,000.00	0.00	0.00	0.00	25,000.00
All Members				87,190.93	0.00	117.35	0.00	87,308.28

*1 TSB can include information external to current fund's transaction records. The amount is per individual across all funds.

Contribution Caps

Member	Contribution Type	Contributions	Cap	Current Position
Defteros, Anastasia	Concessional (5 year carry forward cap available)	15,000.00	50,996.70	35,996.70 Below Cap
	Non-Concessional	0.00	100,000.00	100,000.00 Below Cap
Defteros, Connor	Concessional (5 year carry forward cap available)	23,000.00	51,265.00	28,265.00 Below Cap
	Non-Concessional	0.00	100,000.00	100,000.00 Below Cap
Defteros, Katrina Patricia	Concessional	24,190.93	25,000.00	809.07 Below Cap
	Non-Concessional	0.00	100,000.00	100,000.00 Below Cap
Defteros, Nicholas Constantine	Concessional	25,000.00	25,000.00	At Limit
	Non-Concessional	0.00	100,000.00	100,000.00 Below Cap

Carry Forward Unused Concessional Contribution Cap

Member	2016	2017	2018	2019	2020	2021	Current Position
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Defteros, Anastasia

Concessional Contribution Cap	30,000.00	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	28,000.00	25,304.19	24,873.00	23,809.71	193.59	15,000.00	
Unused Concessional Contribution	0.00	0.00	0.00	1,190.29	24,806.41	10,000.00	
Cumulative Carry Forward Unused	N/A	N/A	N/A	0.00	1,190.29	25,996.70	
Maximum Cap Available	30,000.00	30,000.00	25,000.00	25,000.00	26,190.29	50,996.70	35,996.70 Below Cap
Total Super Balance	0.00	0.00	46,729.39	69,376.00	93,666.22	96,610.24	

Defteros, Connor

Concessional Contribution Cap	30,000.00	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	29,800.00	30,000.00	22,950.00	23,735.00	0.00	23,000.00	
Unused Concessional Contribution	0.00	0.00	0.00	1,265.00	25,000.00	2,000.00	
Cumulative Carry Forward Unused	N/A	N/A	N/A	0.00	1,265.00	26,265.00	
Maximum Cap Available	30,000.00	30,000.00	25,000.00	25,000.00	26,265.00	51,265.00	28,265.00 Below Cap
Total Super Balance	0.00	0.00	52,341.17	73,510.77	98,366.60	101,276.44	

Defteros, Katrina Patricia

Concessional Contribution Cap	30,000.00	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	29,824.34	26,260.95	24,961.82	24,998.61	24,976.08	24,190.93	
Unused Concessional Contribution	0.00	0.00	0.00	1.39	23.92	809.07	
Cumulative Carry Forward Unused	N/A	N/A	N/A	0.00	0.00	0.00	
Maximum Cap Available	30,000.00	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	809.07 Below Cap
Total Super Balance	0.00	0.00	593,010.35	640,790.14	695,762.88	737,216.90	

Defteros, Nicholas Constantine

Concessional Contribution Cap	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	25,000.00	
Concessional Contribution	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	25,000.00	
Unused Concessional Contribution	0.00	0.00	0.00	0.00	0.00	0.00	
Cumulative Carry Forward Unused	N/A	N/A	N/A	0.00	0.00	0.00	
Maximum Cap Available	35,000.00	35,000.00	25,000.00	25,000.00	25,000.00	25,000.00	At Limit
Total Super Balance	0.00	0.00	1,039,367.49	1,071,644.77	1,128,908.09	1,151,575.28	

NCC Bring Forward Caps

Member	Bring Forward Cap	2018	2019	2020	2021	Total	Current Position
Defteros, Anastasia	N/A	0.00	0.00	0.00	0.00	N/A	Bring Forward Not Triggered
Defteros, Connor	N/A	0.00	0.00	0.00	0.00	N/A	Bring Forward Not Triggered
Defteros, Katrina Patricia	N/A	9,382.29	0.00	0.00	0.00	N/A	Bring Forward Not Triggered

03/09/2020	Remitter=SuperChoi ce P/L Ref=PC310820- 191096188	Employer	231.95	Employer	West The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	231.95
01/10/2020	Remitter=SuperChoi ce P/L Ref=PC280920- 110293071	Employer	117.68	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	117.68
15/10/2020	Remitter=SuperChoi ce P/L Ref=PC121020- 196924970	Employer	88.70	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	88.70
30/10/2020	Remitter=SuperChoi ce P/L Ref=PC261020- 121258866	Employer	48.70	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	48.70
26/11/2020	Remitter=SuperChoi ce P/L Ref=PC231120- 163068863	Employer	167.81	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	167.81
10/12/2020	Remitter=SuperChoi ce P/L Ref=PC071220- 164013898	Employer	65.38	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	65.38
31/12/2020	Remitter=SuperChoi ce P/L Ref=PC241220- 179987482	Employer	53.53	Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	53.53

01/02/2021	Remitter=SuperChoice P/L Ref=PC270121-120952504	Employer	1.82			Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	1.82		
08/03/2021	Remitter=SuperChoice P/L Ref=PC030321-127197135	Employer	82.95			Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	82.95		
26/04/2021	Remitter=SuperChoice P/L Ref=PC210421-197058852	Employer	77.28			Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	77.28		
20/05/2021	Remitter=SuperChoice P/L Ref=PC170521-134675600	Employer	87.00			Employer	The Seachange Unit Trust trading as Studio Pilates International Brisbane CBD West	87.00		
30/06/2021	DEPOSIT ONLINE 2611599 TFR Equity Acce Katrina Contributi	Personal - Concessional	23,000.00							
Total - Deferos, Katrina Patricia			24,190.93	0.00	0.00	0.00		1,190.93	0.00	0.00

Deferos, Nicholas Constantine

Date	Transaction Description	Contribution Type	Ledger Data				SuperStream Data				
			Concessional	Non-Concession	Other	Reserves	Contribution	Employer	Concessional	Non-Concess	Other
07/01/2021	DEPOSIT ONLINE 2911358 TFR Equity Acce	Personal - Concessional	2,000.00								
30/06/2021	DEPOSIT ONLINE 2611323 TFR Equity Acce Nick Contribution	Personal - Concessional	23,000.00								

Total - Defteros, Nicholas Constantine

25,000.00 0.00 0.00 0.00

0.00 0.00 0.00

Total for All Members

87,190.93 0.00 117.35 0.00

Bank Accounts >
Westpac Equity Access ▾ 037-142-387131

Westpac (877,157.42) | (124,518.25)
 Statement Balance | Balance in Xero | Different balances?
 29 Oct 2021 | Reconciliation Report | [Manage Account](#) ▾

What's this?

Automatic bank feeds are available for this account [Get bank feeds](#)

- [Reconcile \(177\)](#)
- [Cash coding](#)
- [Bank statements](#)**
- [Account transactions](#)

What's this?

Search Minimum Amount Maximum Amount Date Status

Exact Amount Exact Date

[Search](#) [Clear](#) [Cancel](#)

Showing [Statement lines](#) ▾ No transactions selected [Search](#)

<input type="checkbox"/>	Date	Type	Payee	Particulars	Code	Reference	Analysis Code	Spent	Received	Source	Status
<input type="checkbox"/>	30 Jun 2021	Payment		WITHDRAWAL ONLINE 1611313 TFR Meta Zoe Su Nick Super Contrib				23,000.00		Imported	Reconciled
<input type="checkbox"/>	30 Jun 2021	Payment		WITHDRAWAL ONLINE 1611581 TFR Meta Zoe Su Katrina Super Cont				23,000.00		Imported	Reconciled
<input type="checkbox"/>	30 Jun 2021	Payment		WITHDRAWAL ONLINE 1611929 TFR Meta Zoe Su Central D Rent				6,267.28		Imported	Reconciled
<input type="checkbox"/>	30 Jun 2021	Payment		WITHDRAWAL ONLINE 1612007 TFR Meta Zoe Su Connor Super Cont				23,000.00		Imported	Reconciled
<input type="checkbox"/>	30 Jun 2021	Payment		WITHDRAWAL ONLINE 1612326 TFR Meta Zoe Su Anastasia Super				15,000.00		Imported	Reconciled

Page [1](#) ▾ of 1 (5 total items) | Showing [200](#) ▾ items per page 1

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

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: DR

Family name

DEFTEROS

First given name

NICHOLAS CONSTANTINE

Other given names

3 Date of birth PROVIDED

4 Current postal address

UNIT 10 64 LOWER RIVER TERRACE

Suburb/town/locality

SOUTH BRISBANE

State/territory

QLD

(Australia only)

Postcode

4101

(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

N DEFTEROS DENTAL PTY LTD SUPERANNUATION FUND

7 Fund Australian business number (ABN) 18439193737

8 Member account number DEFNIC00001A

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

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

Section A: Your details

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2 Name

Title: MRS

Family name

DEFTEROS

First given name

KATRINA PATRICIA

Other given names

3 Date of birth PROVIDED

4 Current postal address

UNIT 10 64 LOWER RIVER TERRACE

Suburb/town/locality

SOUTH BRISBANE

State/territory

QLD

(Australia only)

Postcode

4101

(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

N DEFTEROS DENTAL PTY LTD SUPERANNUATION FUND

7 Fund Australian business number (ABN) 18439193737

8 Member account number DEFKAT00001A

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

10 Personal contribution details

Is this notice varying an earlier notice? No Yes

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INTENTION TO CLAIM A TAX DEDUCTION

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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
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- 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.

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Signature

Date

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VARIATION OF PREVIOUS VALID NOTICE OF INTENT

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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

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

Section A: Your details

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2 Name

Title: MISS

Family name

DEFTEROS

First given name

ANASTASIA

Other given names

3 Date of birth PROVIDED

4 Current postal address

64/10 LOWER RIVER TCE

Suburb/town/locality

SOUTH BRISBANE

State/territory

QLD

(Australia only)

Postcode

4101

(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code) 0738445555

Section B: Super fund's details

6 Fund name

N DEFTEROS DENTAL PTY LTD SUPERANNUATION FUND

7 Fund Australian business number (ABN) 18439193737

8 Member account number DEFANA00004A

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

10 Personal contribution details

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2 Name

Title: MR

Family name

DEFTEROS

First given name

CONNOR

Other given names

3 Date of birth PROVIDED

4 Current postal address

64/10 LOWER RIVER TCE

Suburb/town/locality

SOUTH BRISBANE

State/territory

QLD

(Australia only)

Postcode

4101

(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code) 0738445555

Section B: Super fund's details

6 Fund name

N DEFTEROS DENTAL PTY LTD SUPERANNUATION FUND

7 Fund Australian business number (ABN) 18439193737

8 Member account number DEFCON00002A

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

10 Personal contribution details

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- 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 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

➤ 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.