



Australian Government
Australian Taxation Office

Agent CLARKE MCEWAN
Client THE SOUTHEE
 SUPERANNUATION FUND
ABN 55 915 814 714
TFN 97 381 013

01

Income tax 551

Date generated	23/05/2022
Overdue	\$0.00
Not yet due	\$0.00
Balance	\$0.00

Transactions

4 results found - from 23 May 2020 to 23 May 2022 sorted by **processed date** ordered **newest to oldest**

Processed date	Effective date	Description	Debit (DR)	Credit (CR)	Balance
29 Jun 2021	2 Jul 2021	EFT refund for Income Tax for the period from 01 Jul 19 to 30 Jun 20	\$691.61		\$0.00
29 Jun 2021	15 Jun 2021	Tax return Self Man Superfund - Income Tax for the period from 01 Jul 19 to 30 Jun 20		\$691.61	\$691.61 CR
24 Jun 2020	29 Jun 2020	EFT refund for Income Tax for the period from 01 Jul 18 to 30 Jun 19	\$213.40		\$0.00
24 Jun 2020	24 Jun 2020	Tax return Self Man Superfund - Income Tax for the period from 01 Jul 18 to 30 Jun 19		\$213.40	\$213.40 CR



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02

Activity statement 001

Date generated	23/05/2022
Overdue	\$0.00
Not yet due	\$0.00
Balance	\$0.00

Transactions

20 results found - from 23 May 2020 to 23 May 2022 sorted by processed date ordered newest to oldest

Processed date	Effective date	Description	Debit (DR)	Credit (CR)	Balance
1 May 2022	1 May 2022	General interest charge			\$0.00
1 May 2022	28 Apr 2022	Original Activity Statement for the period ending 31 Mar 22 - PAYG Instalments	\$2,560.00		\$0.00
30 Mar 2022	29 Mar 2022	Payment received		\$2,560.00	\$2,560.00 CR
7 Mar 2022	7 Mar 2022	General interest charge			\$0.00
7 Mar 2022	28 Feb 2022	Original Activity Statement for the period ending 31 Dec 21 - PAYG Instalments	\$2,560.00		\$0.00
27 Jan 2022	25 Jan 2022	Payment received		\$2,560.00	\$2,560.00 CR
31 Oct 2021	31 Oct 2021	General interest charge			\$0.00
31 Oct 2021	28 Oct 2021	Original Activity Statement for the period ending 30 Sep 21 - PAYG Instalments	\$2,560.00		\$0.00
18 Oct 2021	15 Oct 2021	Payment received		\$2,560.00	\$2,560.00 CR
1 Aug 2021	1 Aug 2021	General interest charge			\$0.00
1 Aug 2021	28 Jul 2021	Original Activity Statement for the period ending 30 Jun 21 - PAYG Instalments	\$2,980.00		\$0.00
23 Jul 2021	22 Jul 2021	Payment received		\$2,980.00	\$2,980.00 CR
2 May 2021	28 Apr 2021	Original Activity Statement for the period ending 31 Mar 21 - PAYG Instalments	\$2,980.00		\$0.00
29 Apr 2021	28 Apr 2021	Payment received		\$2,980.00	\$2,980.00 CR
7 Mar 2021	2 Mar 2021	Original Activity Statement for the period ending 31 Dec 20 - PAYG Instalments	\$2,980.00		\$0.00
21 Jan 2021	20 Jan 2021	Payment received		\$2,980.00	\$2,980.00 CR
1 Nov 2020	28 Oct 2020	Original Activity Statement for the period ending 30 Sep 20 - PAYG Instalments	\$2,980.00		\$0.00
29 Oct 2020	28 Oct 2020	Payment received		\$2,980.00	\$2,980.00 CR
2 Aug 2020	28 Jul 2020	Original Activity Statement for the period ending 30 Jun 20 - PAYG Instalments	\$2,798.00		\$0.00
29 Jul 2020	28 Jul 2020	Payment received		\$2,798.00	\$2,798.00 CR

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PAYG Instalments report 2021

Tax Agent 75078006
Last Updated 14/05/2022

TFN	Client Name	Quarter 1 (\$)	Quarter 2 (\$)	Quarter 3 (\$)	Quarter 4 (\$)	Total Instalment (\$)
97381013	THE SOUTHEE SUPERANNUATION FUND	2,980.00	2,980.00	2,980.00	2,980.00	11,920.00

Total No of Clients: 1



DR ANDREW E SOUTHEE
C/- CLARKE MCEWAN
PO BOX 491
COTTON TREE QLD 4558

Our reference: 7117271420838
Phone: 13 10 20
Website: ato.gov.au/division293
TFN: 132 561 351
31 July 2020

Additional tax on concessional contributions (Division 293) notice for 2018-19

Dear ANDREW

There is an additional tax on super contributions which reduces the tax concession for individuals whose combined income and contributions are more than the \$250,000 threshold.

Why does the additional tax apply to you

For the 2018-19 financial year, your combined income and super contributions were more than \$250,000. This means you now have to pay an additional tax of 15% on some of your concessional contributions.

How much additional tax do you need to pay

Your additional tax for this notice is:

Taxable super contributions	\$25,000.00
Additional tax due and payable	\$3,750.00
Due date for payment	24 August 2020
Your Payment Reference Number for this amount is:	5510 0132 5613 5131 11


What you need to do now

There are two options for making a payment (your payment can be made using any combination of these):

1. Pay with your own money
2. Elect to release money from any of your existing super balances by completing a Division 293 election form online, instructions to do this are on the final page of this notice.

HOW TO PAY

Your payment reference number (PRN) is: 551001325613513111

<p>BPAY®</p>  <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>Billers code: 75556 Ref: 551001325613513111</p> </div> <p>Telephone & Internet Banking – BPAY®</p> <p>Contact your bank or financial institution to make this payment from your cheque, savings, debit or credit card account. More info: www.bpay.com.au</p>	<p>CREDIT OR DEBIT CARD</p> <p>Pay online with your credit or debit card at www.governmenteasypay.gov.au/PayATO</p> <p>To pay by phone, call the Government EasyPay service on 1300 898 089.</p> <p>A card payment fee applies.</p> <p>For other payment options, visit ato.gov.au/paymentoptions</p>	<p>RELEASE MONEY FROM SUPER</p> <p>You can ask your fund to pay some or all of the amount from your existing super balance. To do this, access our online services through myGov and complete the Division 293 election form.</p>
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Division 293 tax notice of assessment

Income Tax Assessment Act 1997 and Schedule 1 of the Taxation Administration Act 1953

This is your Division 293 tax assessment for the year ended 30 June 2019.

Your additional tax (Division 293 tax) is 15% of your taxable super contributions. Your taxable super contributions are only those Division 293 super contributions that are above the threshold.

Division 293 income (see below)		\$633,049.00	(a)
Division 293 super contributions (see below)		\$25,000.00	(b)
Combined income and super contributions	(a) + (b)	\$658,049.00	(c)
Less the Division 293 threshold		\$250,000.00	(d)
Amount above the threshold	(c) - (d)	\$408,049.00	(e)
Taxable super contributions	the lesser of (b) or (e)	\$25,000.00	(f)
ADDITIONAL TAX	(f) x 15%	\$3,750.00	

Yours sincerely
Melinda Smith
 Deputy Commissioner of Taxation

(a) Division 293 income

Your Division 293 income is your taxable income from your income tax return.

(b) Division 293 super contributions

Your Division 293 super contributions are the total of all your concessional contributions, not including any that are taxed as excess concessional contributions.

Your concessional contributions

THE SOUTHEE SUPERANNUATION FUND SMSF116245443319	Employer contributions	\$34,071.93
Total concessional contributions		\$34,071.93
Less excess concessional contributions		-\$9,071.93
DIVISION 293 SUPER CONTRIBUTIONS		\$25,000.00

Further information

Avoid interest charges

- › You need to pay the due and payable amount by the due date to avoid paying interest charges.
- › Though your election form is valid for 60 days you still need to pay by the due date to avoid interest charges.

Releasing money from super

To release money from any of your existing super balances you can access our ATO online services through myGov and complete the Division 293 election form before 29 September 2020.

When you complete the election form we will ask your nominated super fund(s) to release the amount you elected and send the money to us.

If you are not already registered with myGov visit our website at ato.gov.au/onlineservices to register.

You can also download the form via our website ato.gov.au/div293electionform, or order the form via our website ato.gov.au/onlineordering, and send it to us.

View your online statement of account

To view your tax and super accounts online all you need is a myGov account linked to our ATO online services.

If you are not already registered with myGov visit our website at ato.gov.au/onlineservices to register.

If you have a tax agent, they can also view your tax and super accounts through the Tax Agent Portal.

If you disagree

If you disagree with:

- › the income we have used, you will need to review your income tax return.
- › the contributions reported, contact your super fund.
- › the amount of your excess concessional contributions, your options are explained in your excess concessional contributions determination.
- › our assessment, you can lodge an objection. Visit ato.gov.au/objections to find out more. If you do lodge an objection to the assessment you still need to pay the due and payable amount by the due date.

Find out more

For more information about Division 293 tax:

- › visit ato.gov.au/division293
- › phone us on **13 10 20** between 8:00am and 6:00pm, Monday to Friday.

Visit our website at ato.gov.au/contactus for more contact options.