JOYCE EVANS SUPERFUN	١D
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# 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 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 However, you cannot lodge your tax return electronically if you do not quote your TFN.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

#### 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.

Tax file number	XXX XXX XXX		Year	2023	
Name of partnership, trust, fund or entity	JOYCE EVANS	SUPERFUND			
trust, fund or entity	SOLCE HAURD	Ber Hitt one			

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:

• the information provided to the agent for the preparation of this tax return, including any applicable schedules is true and correct, and

•	the agent is	authorised	to lo	dge this	tax	return.	
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Signature of partner, trustee or director	Date	

# 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 an approved ATO electronic lodgment 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.

Agent's reference number	74081009
Account Name	D Baker & Associates Trust Acc
I authorise the refund to be	deposited directly to the specified account.

Signature

Date

		Self-managed superannuat	tion	2023	
Wh	o should complete this annual return?		Return year	2023	
con	y self-managed superannuation funds (SMSI pplete this annual return. All other funds must ind income tax return 2023 (NAT 71287).		riotani you		
in	ne Self-managed superannuation fund ann structions 2023 (NAT 71606) (the instructio ou to complete this annual return.				
ch vi	ne SMSF annual return cannot be used to r nange in fund membership. You must upda a ABR.gov.au or complete the Change of d uperannuation entities form (NAT3036).	te fund details			
Se	ction A: Fund information				
1	Tax file number (TFN)	XXX XXX XXX			
		bur TFN. You are not obliged to quote your TFN but not quoting rannual return. See the Privacy note in the Declaration.	ng it could increa	se the	
2	Name of self-managed superannuat	ion fund (SMSF)			
		JOYCE EVANS SUPERFUND			
3	Australian business number (ABN) (if applicable)	41 095 913 891			
4	Current postal address	C/- D BAKER & ASSOCIATES PTY LTD			
		PO Box 310			
		MIDLAND	WA	6936	
5	Annual return status Is this an amendment to the SMSF's 2023 r Is this the first required return for a newly				
	SMSF auditor				
6	Auditor's name Title	Mr			
	Familyname	Boys			
	First given name	Tony			
	Other given names				
	SMSF Auditor Number	100 014 140			
	Auditor's phone number	041 0712708			
	Use Agent Postal address address	PO Box 3376			
		Rundle Mall	SA	5000	
		Date audit was completed	, ]		
			N		
			N		
		If Part B of the audit report was qualified, have the reported issues been rectified?			

Sensitive (when completed)

# SMSF Return 2023

# JOYCE EVANS SUPERFUND

	Fund's financial in	nstitution account	details	•		
	This account is used	I for super contributio	ns and rollovers.	Do not prov	ide a tax agent acc	ount here.
	Fund BSB number	806015	Fund accou	unt number	01964317	
	Fund account name					
	Joyce Evans	Superfund				
	I would like my tax r	efunds made to this a		rint Y for yes r N for no.	If Yes, Go to C.	
						Use Agent Trust Account?
В	8 Financial instituti	on account details	s for tax refund	ds		
	This account is used	for tax refunds. You	can provide a ta	ax agent acc	ount here.	
	BSB number	066115	Accou	unt number	10334994	
	Account name					
	D Baker & As	sociates Trus	st Acc			
с	Electronic service	e address alias				
-	Provide the electron	ic service address ali dataESAAlias). See i	as(ESA) issued b nstructions for me	oy your SMS ore informati	F messaging provic on.	ler.
		,				
					XXXXX	<b>x xxx xxxx xxxxx xxxxx</b> xx <b>x</b> xx ××× ××
8 S	Status of SMSF	Australian supera	nnuation fund	A Y	Fu	Ind benefit structure B A Code
		trust deed allow acce nment's Super Co-co Low Income Sup	ntribution and	<b>C</b> Y		
• • •	Vas the fund wound		Day	Month Yea	ar	
N	N Print Y for yes	If yes, provide the	date on			
		which the fund wa				Have all tax lodgment and payment bligations been met?
		which the fund wa				
0 E	Exempt current pens					and payment
D		sion income	is wound up	eam benefits	c	and payment bligations been met?
D in	Exempt current pens	sion income lent phase superannu on for current pension	ation income stre		to one or more mer	and payment bligations been met?
D in t	Exempt current pens bid the fund pay retirem the income year? To claim a tax exemption	sion income lent phase superannu on for current pension ot current pension inco	ation income stre		to one or more mer	and payment bligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exemp If No, Go to Section B: I	sion income lent phase superannu on for current pension ot current pension inco	ation income stre income, you mus	st pay at leas	to one or more mer	and payment bligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exemp If No, Go to Section B: I If Yes Exempt current	sion income nent phase superannu on for current pension ot current pension inco Income t pension income amo	ation income stre	st pay at leas	to one or more mer st the minimum benu 598	and payment bligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exempt If No, Go to Section B: I If Yes Exempt current Which method o	sion income lent phase superannu on for current pension ot current pension inco	ation income stre	st pay at leas	to one or more mer st the minimum benu 598	and payment bligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exempt if No, Go to Section B: I If Yes Exempt current Which method of Seg	sion income ent phase superannu on for current pension ot current pension inco Income t pension income amo did you use to calcula	ation income stre	st pay at leas 29 , surrent pensio	to one or more mer st the minimum benu 598	and payment biligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exempt if No, Go to Section B: I If Yes Exempt current Which method of Seg	sion income lent phase superannu on for current pension ot current pension inco Income t pension income amo did you use to calcula gregated assets meth gregated assets meth	ation income stre	st pay at leas 29 , current pensio Was an actu	to one or more mer st the minimum bend 598 on income?	and payment biligations been met?
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exempt of No, Go to Section B: I If Yes Exempt current Which method of Seg Unseq	sion income ent phase superannu on for current pension ot current pension inco Income t pension income amo did you use to calcula gregated assets meth gregated assets meth	ation income stre	st pay at leas 29 , current pensio Was an actu	to one or more mer st the minimum bene 598 on income? harial certificate obta rint <b>Y</b> for yes <b>If Yes</b> ,	and payment biligations been met? nbers Y Print Y for yes or N for no. efit payment under ained? D Print Y for yes go to Section B: Income
D in t	Exempt current pens bid the fund pay retirem in the income year? To claim a tax exemption the law. Record exempt of No, Go to Section B: I If Yes Exempt current Which method of Seg Unseq	sion income lent phase superannu on for current pension ot current pension inco Income t pension income amo did you use to calcula gregated assets meth gregated assets meth y other income that w Choosing 'No' m	ation income stre income, you mus ome at Label A. unt A te your exempt c od B od C X vas assessable? eans that you do	st pay at leas 29, current pension Was an actu E N P not have an	to one or more mer st the minimum bene 598 on income? harial certificate obta rint Y for yes N for no.	and payment biligations been met?

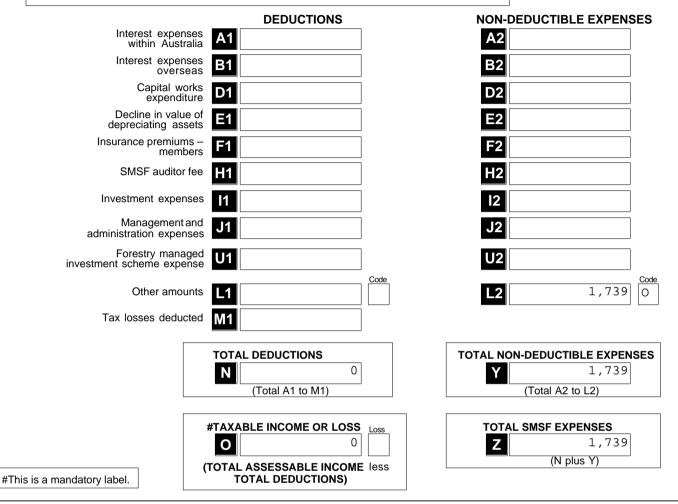
# JOYCE EVANS SUPERFUND

	JUICEEV	ANSSUPERFUND	XXXX XXX XXXXXXX	Page 3 of 1
tion B: Incon	ne			
tirement phase fo	r the entire year, there was no othe	ests in the SMSF were supporting superannuation er income that was assessable, and you have n , you can record these at Section D: Income tax	ot realised a deferred	
Income	Have you applied an	G N Print Y for yes and the deferre	tal loss or total capital gain is elected to use the transitiona d notional gain has been real apital gains tax (CGT) schedu	I CGT relief in 2 ised, complete
	exemption or rollover?	Net capital gai	n A	
		Gross rent and other leasing and hiring incom		
		Gross interes	t C	
		Forestry managed investmer scheme incom		
Gross fore	ign income			Loss
D1		Net foreign incom	e <b>D</b>	
	Australia	n franking credits from a New Zealand compan	y E	
		Transfers fror foreign fund		Numb
		Gross payments wher ABN not quote	e H	
	e employer contributions	Gross distributio from partnership		Loss
R1	0 le personal contributions	* Unfranked dividen amour		
R2	0	* Franked dividen amour		
plus #*No-TFN	-quoted contributions	* Dividend frankin cred	g L	
	be included even if it is zero) of liability to life	* Gross true distribution		Code
	company or PST	Assessable contribution (R1 plus R2 plus R3 less R6	s) R	0
			,	
	on-arm's length income			
	iny dividends	* Other incom	e S	Code
	arm's length trust distributions	*Assessable incom due to changed ta		
U2		status of fun		
U3	non-arm's length income	Net non-arm's length income (subject to 45% tax rate (U1 plus U2 plus U3		
	entered at this label, check the nsure the correct tax	GROSS INCOM (Sum of labels A to U	EW	Loss
	2FF22.	Exempt current pension incom	e Y	
				Loss

# Section C: Deductions and non-deductible expenses

# 12 Deductions and non-deductible expenses

Under 'Deductions' list all expenses and allowances you are entitled to claim a deduction for. Under 'Non-deductible expenses', list all other expenses or normally allowable deductions that you cannot claim as a deduction (for example, all expenses related to exempt current pension income should be recorded in the 'Non-deductible expenses' column).



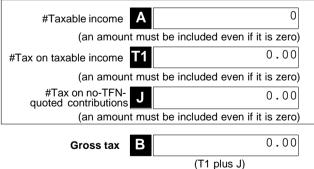
# Section D: Income tax calculation statement

#Important:

Section B label R3, Section C label O and Section D labels A,T1, J, T5 and I are mandatory. If you leave these labels blank, you will have specified a zero amount.

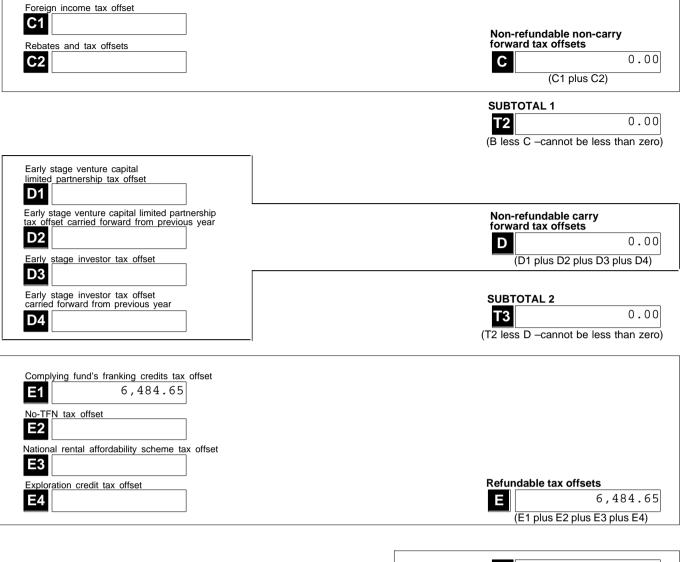
# 13 Calculation statement

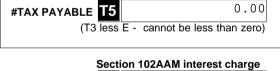
Please refer to the Self-managed superannuation fund annual return instructions 2023 on how to complete the calculation statement.



#### SMSF Return 2023

## JOYCE EVANS SUPERFUND





G

Sensitive (when completed)

Fund's tax file number (TFN) XXX XXX XXX

Credit for tax withheld – foreign resident withholding (excluding capital gains)	
H2	
Credit for tax withheld – where ABN or TFN not quoted (non-individual)	
H3	
Credit for TFN amounts withheld from payments from closely held trusts	
H5	
Credit for interest on no-TFN tax offset	
H6	
Credit for foreign resident capital gains withholding amounts	Eligible credits
H8	<b>H</b> 0.00
	(H2 plus H3 plus H5 plus H6 plus H8)

<b>#Tax offset refund</b> (Remainder of refundable tax offs an	6,484,65
	PAYG instalments raised
	K
	Supervisory levy
	L 259.00
	Supervisory levy adjustment for wound up funds
	Μ
	Supervisory levy adjustment for new funds
	Ν
Total amount of tax refundabl	e S 6,225.65
(T5 plus G	less H less I less K plus L less M plus N)

#This is a mandatory label.

Sec	tion E: <b>Losse</b>	S		
14	Losses			
	If total loss is greater than \$100,000, complete and attach a Losses schedule 2023.		Tax losses carried forward to later income years	
			Net capital losses carried forward to later income years	
	Net capital lo	osses brought forward	Net capital losses carried forward	
		from prior years	to later income years	
	Non-Collectables			
	Collectables			

SMSF Return 2023 JOYCE EVANS SUPERFUND n

		See the Privacy note in	the Declaration.	Member	
Title	Mrs	Member'sTFN XXX	XXX XXX	1	
Familyname	Evans			Account status	
First given name	Joyce			O <sub>Code</sub>	
Other given names					
	Date of birth 05/01/	1945 If deceased, date of death		]	
Contributions		OPENING ACCOUNT BALAN	CE 336	,001.39	
Refer to instruction	ons for completing these l	abels.	Proceeds from primary	esidence disposal	
Employer contrib			H Receipt date		
A			H1		
ABN of principal	employer		Assessable foreign sup	erannuation	
A1			fund amount		
Personal contribu	utions		Non-assessable foreign	superannuation	
В			fund amount		
	ess retirement exemption		Transfer from reserve:		
С			assessable amount		
CGT small busir exemption amou	ness 15-year nt		K		
D			Transfer from reserve: non-assessable amoun	t	
Personal injury e	lection		L		
Е			Contributions from non-conduction and previously non-compared and previously non-compa	omplying funds plying funds	
Spouse and child	d contributions		Т		
F			Any other contributions (	(including	
Other third party	contributions		Super Co-contributions a Income Super Amounts)	and low	
G			Μ		
			0.00		
	IOTAL CONT	(Sum of labels A to			
		(Sum of labels A to			
Other transaction	-	1	Allocated earnings or lo		
· · · ·	hase account balance		<b>O</b> 46	,365.12	
S1	0.00		Inward rollovers and tra	ansfers	
Retirement phas - Non CDBIS	e account balance		Р		
S2	344,761.76		Outward rollovers and	transfers	
Retirement phas - CDBIS	e account balance		Q		
-00615 <b>S3</b>	0.00		Lump Sum payments	Code	
			R1		
			Income stream payment		
			<b>R2</b> 37	,604.75 M	
0 TF	RISCount	CLOSING ACCOUNT BALANCE	<b>S</b> 344	,761.76	
			(S1 plus S2 plus S3	3)	
		Accumulation phase value	X1		
		Retirement phase value	<b>X2</b> 344	,761.76	
		Outstanding limited recourse	Υ		
		borrowing arrangement amount			

Sensitive (when completed)

SMSF Return 2023	JOYCE EVANS SUPERFUND	XXXX XXX XXX XXX I	Page 8 of 10
Section H: Assets and liabilitie 15 ASSETS	5		
15a Australian managed investments	Listed trust	s A	
	Unlisted trust	s B	
	Insurance polic	y C	
	Other managed investment	s D	
15b Australian direct investments	Cash and term deposit	s <b>E</b> 1,6	516
	Debt securitie	s <b>F</b>	
Limited recourse borrowing arrangement	s Loan:	s G	
Australian residential real property	Listed share	s <b>H</b> 336,6	560
Australian non-residential real property	Unlisted share	s	
Overseas real property	Limited recourse borrowing arrangements	5 J	0
Australian shares	Non-residential real propert	y K	
J4	Residential real propert	y L	
Overseas shares	Collectables and personal use asset	s M	
Other J6	Other asset	s <b>O</b> 6,4	185
Property count			
15c Other investments	Crypto-Currenc	y N	
15d Overseas direct investments	Overseas share	s P	
	Overseas non-residential real propert	y Q	
	Overseas residential real propert	y R	
	Overseas managed investment	s S	
	Other overseas asset	s <b>T</b>	
	TOTAL AUSTRALIAN AND OVERSEAS ASSET (Sum of labels A to T)	<b>SU</b> 344,7	761
15e In-house assets			
Did the fund have related p	a loan to, lease to or investment in, arties (known as in-house assets) at the end of the income year?		
15f Limited recourse borrowing arra	ngements		
If the	fund had an LRBA were the LRBA borrowings from a licensed financial institution?		
Did th fund	e members or related parties of the use personal guarantees or other security for the LRBA?		

# SMSF Return 2023

# 16 LIABILITIES

Borrowings for limited recourse borrowing arrangements			
V1			
Permissible temporary borrowings			
V2			
Other borrowings			
V3		Borrowings V	
	Total member closi	ng account balances	344,761
(total of	all CLOSING ACCOUNT BALANCEs fro	om Sections F and G)	544,701
		Reserve accounts X	
		Other liabilities Y	
	ר	TOTAL LIABILITIES Z	344,761
tion I: Taxation of financial ar	rangements		

Total TOFA gains

Total TOFA losses

# Section J: Other information Family trust election status

If the trust or fund 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).	Α
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.	B
Interposed entity election status	
If the trust or fund has an existing election, write the earliest income year specified. If the trust or fund 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.	С
If revoking an interposed entity election, print R, and complete and attach the Interposed entity election or revocation 2023.	D

## 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.

## 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

						Day Month	Year
					Date	06/12/20	)23
Preferred trustee or director con	tact detail	s:					
	Title	Mrs					
Fa	milyname	Evans		-			
First g	ven name	Joyce					
Other given names							
Phone number			Number 92746637				
Email address							
Non-individual trustee name (if applicable)							
ABN of non-individual trustee							
Hrs Time taken to prepare and complete this annual return							
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:	S PTY I	JTD					
declare that the Self-managed sup by the trustees, that the trustees h the trustees have authorised me to	erannuatior ave given m	n fund annual retu ne a declaration st					nd that
Tax agent's signature					Date	06/12/202	23
Tax agent's contact details					_		
Title	Mr						
Familyname	Mosbach	1					]
First given name	Farrell	-					-
Other given names							
Tax agent's practice	D BAKEF	& ASSOCIA	TES PTY I	JTD			
Tax agent's phone number	Area code 0 8	Number 9274663	7				Ţ
Tax agent number	7408100	)9		Reference number	EVA04		