

(Taurus 4 Pty Ltd) Trustee for the Osborne Family Superannuation Fund

2 June 2018

Alan Osborne (Member No 01)
26 Fleetwood-Smith Street
NICHOLLS ACT 2913

Tax Deduction Claim Form.

Dear Alan,

We have received your completed Notice of Intent to Claim a Tax Deduction for Personal Superannuation Contributions; and we have processed your Notice for the 2017-18.

Fund name:	Osborne Family Superannuation Fund
Fund ABN:	54 228 557 508
Amount Contributed:	\$25,000.00
Amount Claimed:	\$25,000.00

We will report this contribution to the ATO in our Annual Return (SAR).

You will need to show this claim amount as a tax deduction in the Supplementary section of your tax return.

Yours sincerely,



Sonja Osborne
Director OFSF



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

COMPLETING THIS STATEMENT

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.
- Place ☒ in ALL applicable boxes.

! The instructions contain important information about completing this notice. Refer to them for more information about how to complete and lodge this notice.

Section A: Your details

1 Tax file number (TFN)

87 457 421

! 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: Mr ☒ Mrs ☐ Miss ☐ Ms ☐ Other ☐

Family name

OSBORNE

First given name

ALAN

Other given names

CHRISTOPHER

3 Date of birth Day Month Year
03 / 05 / 1956

4 Current postal address

26 FLEETWOOD SMITH ST

Suburb/town/locality

NICHOLLS

State/territory

ACT
(Australia only)

Postcode

2913
(Australia only)

Country if outside of Australia

AUSTRALIA

5 Daytime phone number (include area code) 0412820655

Section B: Super fund's details

6 Fund name

OSBORNE FAMILY SUPER FUND

7 Fund Australian business number (ABN) 54 228 557 508

8 Member account number 01

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

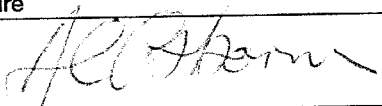
before the end of the income year following the year in which the contribution was made.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

ALAN OSBORNE

Signature



Date

Day

Month

Year

27 / 06 / 2018

➡ 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

\$

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.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that the information given on this notice is correct and complete.

[illegible]

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(Taurus 4 Pty Ltd) Trustee for the Osborne Family Superannuation Fund

2 June 2018

Sonja Osborne (Member No 02)
26 Fleetwood-Smith Street
NICHOLLS ACT 2913

Tax Deduction Claim Form.

Dear Sonja,

We have received your completed Notice of Intent to Claim a Tax Deduction for Personal Superannuation Contributions; and we have processed your Notice for the 2017-18.

Fund name:	Osborne Family Superannuation Fund
Fund ABN:	54 228 557 508
Amount Contributed:	\$25,000.00
Amount Claimed:	\$25,000.00

We will report this contribution to the ATO in our Annual Return (SAR).

You will need to show this claim amount as a tax deduction in the Supplementary section of your tax return.

Yours sincerely,



Alan Osborne
Director OFSF



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



The instructions contain important information about completing this notice. Refer to them for more information about how to complete and lodge this notice.

COMPLETING THIS STATEMENT

- Print clearly using a black pen only.
- Use BLOCK LETTERS and print one character per box.

Place ☒ in ALL applicable boxes.

Section A: Your details

1 Tax file number (TFN)

687 506 696

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: Mr ☐ Mrs ☒ Miss ☐ Ms ☐ Other ☐

Family name

OSBORNE

First given name

SONJA

Other given names

3 Date of birth

Day Month Year
21 / 03 / 1957

4 Current postal address

26 FLEETWOOD-SMITH ST

Suburb/town/locality State/territory Postcode

NICHOLLS

ACT

2913

Country if outside of Australia

5 Daytime phone number (include area code)

0423049754

Section B: Super fund's details

6 Fund name

THE OSBORNE FAMILY SUPERANNUATION FUND

7 Fund Australian business number (ABN)

54 228 557 508

8 Member account number

02

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

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Section D: Declaration

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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

Day Month Year
 / /

➡ 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

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VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that the information given on this notice is correct and complete.

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