

Self managed superannuation fund annual return

2008
A03MS08

Who should complete this annual return?

Only self managed superannuation funds (SMSFs) can complete this annual return. All other funds must complete the *Fund income tax return 2008* (NAT 71287).

TO COMPLETE THIS ANNUAL RETURN

- Print clearly, using a BLACK pen only.
- Use BLOCK LETTERS
- Print in ALL applicable boxes.

 The *Self managed superannuation fund annual return 2008 instructions* (NAT 71606) (the instructions) can assist you to complete this annual return.

Section A: Fund information

 To assist processing, write the fund's TFN at the top of pages 3 and 5.

1 Tax file number (TFN)

 The Tax Office is authorised by law to request your TFN. You are not obliged to quote your TFN but not quoting it could increase the chance of delay or error in processing your annual return.

2 Name of self managed superannuation fund (SMSF)

3 Australian business number (ABN) (if applicable)

4 Current postal address

Suburb/town

State/territory

Postcode

5 Annual return status

Is this an amendment to the SMSF's 2008 annual return? **No** **Yes**

6 Fund auditor

Auditor's name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Professional body
Code

Membership number

Auditor's phone number

Postal address

Suburb/town

State/territory

Postcode

Date audit was completed **A** Day / Month / Year

Was the audit report qualified? **B** **No** **Yes**

7 Electronic funds transfer (EFT)

Do you want to use EFT for any tax refunds related to this annual return? **No** **Yes**

 Complete financial institution details below.

BSB code (Include all six numbers.)

Account number

Full account name

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Tax file number

Name of entity

Signature as prescribed in tax return

8 Status of SMSF	Australian superannuation fund	A	No	Yes	Fund benefit structure	B	Code
	Does the fund trust deed allow acceptance of the Government's Super Co-contributions?	C	No	Yes			

9 Was the fund wound up during the income year?

No	Yes	Date on which the fund was wound up	Day /	Month /	Year	Have all tax lodgment and payment obligations been met?	No	Yes
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Section B: Income

10 Income

Did you have a capital gains tax (CGT) event during the year? **G** No Yes If the total capital loss or total capital gain is greater than \$10,000 complete and attach a *Capital gains tax (CGT) schedule 2008*.

Did the CGT event relate to a forestry managed investment scheme interest that you held other than as an initial participant? **Z** No Yes You must complete and attach a *Capital gains tax (CGT) schedule 2008*.

Net capital gain	A	\$
Gross rent and other leasing and hiring income	B	\$
Gross interest	C	\$
Forestry managed investment scheme income	X	\$
Gross foreign income	D1	\$
Net foreign income	D	\$

Australian franking credits from a New Zealand company	E	\$	
Transfers from foreign funds	F	\$	Number
Gross payments where ABN not quoted	H	\$	
Gross distribution from partnerships	I	\$	Loss
*Unfranked dividend amount	J	\$	
*Franked dividend amount	K	\$	
*Dividend franking credit	L	\$	
*Gross trust distributions	M	\$	Code
Assessable contributions (R1 plus R2 plus R3 less R6)	R	\$	

Calculation of assessable contributions Assessable employer contributions R1 \$ plus Assessable personal contributions R2 \$ plus *No TFN quoted contributions R3 \$ less Transfer of liability to life insurance company or PST R6 \$			
Calculation of non-arm's length income *Net non-arm's length private company dividends U1 \$ plus *Net non-arm's length trust distributions U2 \$ plus *Net other non-arm's length income U3 \$			
		*Other income	S \$
		*Assessable income due to changed tax status of fund	T \$
		Net non-arm's length income (subject to 45% tax rate) (U1 plus U2 plus U3)	U \$

TOTAL ASSESSABLE INCOME	V	\$	Loss
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*If an amount is entered at this label, check the instructions to ensure the correct tax treatment has been applied.

Tax file number

Name of entity

Signature as prescribed in tax return



Place your attachments here.

Section C: Deductions

11 Deductions

- Exempt current pension income **K \$**
- Interest expenses within Australia **A \$**
- Interest expenses overseas **B \$**
- Capital works deductions **D \$**
- Deduction for decline in value of depreciating assets **E \$**
- Death or disability premiums **F \$**
- Death benefit increase **G \$**
- Approved auditor fee **H \$**
- Investment expenses **I \$**
- Management and administration expenses **J \$**
- Forestry managed investment scheme deduction **U \$**
- Other deductions **L \$**
- Tax losses deducted **M \$**

Code

TOTAL DEDUCTIONS N \$

Loss

TAXABLE INCOME OR LOSS O \$
(TOTAL ASSESSABLE INCOME *less* TOTAL DEDUCTIONS)

Section D: Income tax calculation statement

12 Income tax calculation statement

Taxable income **A \$**

Credit: foreign tax credit

C1 \$

plus Credit: rebates and tax offsets

C2 \$

Gross tax **B \$**

Rebates, offsets, foreign credits **C \$**
(**C1 plus C2**)

Credit: interest on early payments

F1 \$

plus Credit: foreign resident withholding

F2 \$

plus Credit: ABN/TFN not quoted (non-individual)

F3 \$

plus Credit: refundable franking credits

F4 \$

SUBTOTAL D \$
(**B less C**) (Cannot be less than zero)

Section 102AAM interest charge **E \$**

Eligible credits **F \$**
(**F1 plus F2 plus F3 plus F4**)

PAYG instalments raised **G \$**

Supervisory levy **H \$**

TOTAL AMOUNT DUE OR REFUNDABLE I \$
(**D plus E less F less G plus H**)

Section E: Losses

13 Losses

❗ If total loss is greater than \$100,000, or there is a foreign loss, complete and attach a *Losses schedule 2008*.

Tax losses carried forward to later income years **U \$**

Net capital losses carried forward to later income years **V \$**

Tax file number

Name of entity

Signature as prescribed in tax return

Section F: Member information

! Report all members at 30 June 2008 including those who didn't receive any contributions.

! Do not use this section for:

- deceased members
- members in excess of the four-member SMSF limit at **30 June 2008**. Report these members in **Section G: Supplementary member information**.

Do not report former members who have exhausted all their entitlements, for example, through lump sum or income stream, or who rolled over all their contributions to another fund.

MEMBER 1

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

Contributions

- Employer contributions **A \$**
- ABN of principal employer **A1**
- Personal contributions **B \$**
- CGT small business retirement exemption **C \$**
- CGT small business 15-year exemption amount **D \$**
- Personal injury election **E \$**
- Spouse and child contributions **F \$**
- Other family and friend contributions **G \$**
- Directed termination (taxable component) payments **H \$**
- Assessable foreign superannuation fund amount **I \$**
- Non-assessable foreign superannuation fund amount **J \$**
- Transfer from reserve: assessable amount **K \$**
- Transfer from reserve: non-assessable amount **L \$**
- Any other contributions (including Super Co-contributions) **M \$**

TOTAL CONTRIBUTIONS N \$

Other transactions

- Allocated earnings or losses **O \$**
- Inward rollover amounts **P \$**
- Outward rollover amounts **Q \$**
- Benefit payments and code **R \$**

Loss

Code

CLOSING ACCOUNT BALANCE S \$

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Tax file number

Name of entity

Signature as prescribed in tax return

! Report all members at 30 June 2008 including those who didn't receive any contributions.

! Do not use this section for:
 ■ deceased members
 ■ members in excess of the four-member SMSF limit at **30 June 2008**.
 Report these members in **Section G: Supplementary member information**.
 Do not report former members who have exhausted all their entitlements, for example, through lump sum or income stream, or who rolled over all their contributions to another fund.

MEMBER 2

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

Contributions

Employer contributions **A** \$

ABN of principal employer **A1**

Personal contributions **B** \$

CGT small business retirement exemption **C** \$

CGT small business 15-year exemption amount **D** \$

Personal injury election **E** \$

Spouse and child contributions **F** \$

Other family and friend contributions **G** \$

Directed termination (taxable component) payments **H** \$

Assessable foreign superannuation fund amount **I** \$

Non-assessable foreign superannuation fund amount **J** \$

Transfer from reserve: assessable amount **K** \$

Transfer from reserve: non-assessable amount **L** \$

Any other contributions (including Super Co-contributions) **M** \$

TOTAL CONTRIBUTIONS N \$

Other transactions

Allocated earnings or losses **O** \$

Loss

Inward rollover amounts **P** \$

Outward rollover amounts **Q** \$

Code

Benefit payments and code **R** \$

CLOSING ACCOUNT BALANCE S \$

Self managed superannuation fund annual return 2008

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Tax file number

Name of entity

Signature as prescribed in tax return

! Report all members at 30 June 2008 including those who didn't receive any contributions.

! Do not use this section for:
■ deceased members
■ members in excess of the four-member SMSF limit at **30 June 2008**.
Report these members in **Section G: Supplementary member information**.
Do not report former members who have exhausted all their entitlements, for example, through lump sum or income stream, or who rolled over all their contributions to another fund.

MEMBER 3

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

Contributions

Employer contributions **A** \$

ABN of principal employer **A1**

Personal contributions **B** \$

CGT small business retirement exemption **C** \$

CGT small business 15-year exemption amount **D** \$

Personal injury election **E** \$

Spouse and child contributions **F** \$

Other family and friend contributions **G** \$

Directed termination (taxable component) payments **H** \$

Assessable foreign superannuation fund amount **I** \$

Non-assessable foreign superannuation fund amount **J** \$

Transfer from reserve: assessable amount **K** \$

Transfer from reserve: non-assessable amount **L** \$

Any other contributions (including Super Co-contributions) **M** \$

TOTAL CONTRIBUTIONS N \$

Other transactions

Allocated earnings or losses **O** \$

Loss

Inward rollover amounts **P** \$

Outward rollover amounts **Q** \$

Benefit payments and code **R** \$

Code

CLOSING ACCOUNT BALANCE S \$

Self managed superannuation fund annual return 2008

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Tax file number

Name of entity

Signature as prescribed in tax return

! Report all members at 30 June 2008 including those who didn't receive any contributions.

! Do not use this section for:
■ deceased members
■ members in excess of the four-member SMSF limit at **30 June 2008**.
Report these members in **Section G: Supplementary member information**.
Do not report former members who have exhausted all their entitlements, for example, through lump sum or income stream, or who rolled over all their contributions to another fund.

MEMBER 4

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

Contributions

Employer contributions **A** \$

ABN of principal employer **A1**

Personal contributions **B** \$

CGT small business retirement exemption **C** \$

CGT small business 15-year exemption amount **D** \$

Personal injury election **E** \$

Spouse and child contributions **F** \$

Other family and friend contributions **G** \$

Directed termination (taxable component) payments **H** \$

Assessable foreign superannuation fund amount **I** \$

Non-assessable foreign superannuation fund amount **J** \$

Transfer from reserve: assessable amount **K** \$

Transfer from reserve: non-assessable amount **L** \$

Any other contributions (including Super Co-contributions) **M** \$

TOTAL CONTRIBUTIONS N \$

Other transactions

Allocated earnings or losses **O** \$

Loss

Inward rollover amounts **P** \$

Outward rollover amounts **Q** \$

Code

Benefit payments and code **R** \$

CLOSING ACCOUNT BALANCE S \$

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Tax file number

Name of entity

Signature as prescribed in tax return

Section G: Supplementary member information

Use this section for:

- deceased members
- members in excess of the four-member SMSF limit at **30 June 2008**.

MEMBER 5

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

If deceased, date of death

Day / Month / Year

Contributions

Employer contributions **A** \$

ABN of principal employer **A1**

Personal contributions **B** \$

CGT small business retirement exemption **C** \$

CGT small business 15-year exemption amount **D** \$

Personal injury election **E** \$

Spouse and child contributions **F** \$

Other family and friend contributions **G** \$

Directed termination (taxable component) payments **H** \$

Assessable foreign superannuation fund amount **I** \$

Non-assessable foreign superannuation fund amount **J** \$

Transfer from reserve: assessable amount **K** \$

Transfer from reserve: non-assessable amount **L** \$

Any other contributions (including Super Co-contributions) **M** \$

TOTAL CONTRIBUTIONS N \$

Other transactions

Allocated earnings or losses **O** \$

Loss

Inward rollover amounts **P** \$

Outward rollover amounts **Q** \$

Benefit payments and code **R** \$

Code

CLOSING ACCOUNT BALANCE S \$

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Tax file number

Name of entity

Signature as prescribed in tax return

! Use this section for:

- deceased members
- members in excess of the four-member SMSF limit at **30 June 2008**.

MEMBER 6

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Member's TFN

Date of birth

Day / Month / Year

If deceased, date of death

Day / Month / Year

Contributions

Employer contributions **A** \$

ABN of principal employer **A1**

Personal contributions **B** \$

CGT small business retirement exemption **C** \$

CGT small business 15-year exemption amount **D** \$

Personal injury election **E** \$

Spouse and child contributions **F** \$

Other family and friend contributions **G** \$

Directed termination (taxable component) payments **H** \$

Assessable foreign superannuation fund amount **I** \$

Non-assessable foreign superannuation fund amount **J** \$

Transfer from reserve: assessable amount **K** \$

Transfer from reserve: non-assessable amount **L** \$

Any other contributions (including Super Co-contributions) **M** \$

TOTAL CONTRIBUTIONS N \$

Other transactions

Allocated earnings or losses **O** \$

Loss

Inward rollover amounts **P** \$

Outward rollover amounts **Q** \$

Benefit payments and code **R** \$

Code

CLOSING ACCOUNT BALANCE S \$



! If additional members need to be reported in **Section G: Supplementary member information** copy this page and attach to the annual return. **DO NOT USE STAPLES.**

Tax file number

Name of entity

Signature as prescribed in tax return

[Signature box]

Section H: **Assets and liabilities**

14 ASSETS

14a Australian managed investments

Listed trusts **A \$**

Unlisted trusts **B \$**

Insurance policy **C \$**

Other managed investments **D \$**

14b Australian direct investments

Cash and term deposits **E \$**

Debt securities **F \$**

Loans **G \$**

Listed shares **H \$**

Unlisted shares **I \$**

Derivatives and instalment warrants **J \$**

Non-residential real property **K \$**

Residential real property **L \$**

Artwork, collectibles, metal or jewels **M \$**

Other assets **O \$**

14c Overseas direct investments

Overseas shares **P \$**

Overseas non-residential real property **Q \$**

Overseas residential real property **R \$**

Overseas managed investments **S \$**

Other overseas assets **T \$**

TOTAL AUSTRALIAN AND OVERSEAS ASSETS U \$

15 LIABILITIES

Borrowings **V \$**

Total member closing account balances **W \$**
(total of all **CLOSING ACCOUNT BALANCES** from Sections F and G)

Reserve accounts **X \$**

Other liabilities **Y \$**

TOTAL LIABILITIES Z \$

Tax file number

Name of entity

Signature as prescribed in tax return

Section I: Regulatory information

● The following questions indicate the operational status of the SMSF. Penalties will apply for false or misleading information. You must answer either **No** or **Yes** for all questions listed and provide dollar amounts if applicable.

In-house and related party assets

- Did the SMSF loan, lease to or invest in related parties (known as in-house assets)? **A** No Yes \$
- Did the SMSF hold in-house assets at any time during the year that exceeded 5% of total assets? **B** No Yes
- Did the SMSF hold an investment in a related party at any time during the year (excluding in-house assets)? **C** No Yes \$
- Did the SMSF acquire any assets (other than exempt assets) from related parties? **D** No Yes \$

Other regulatory questions

- Did the SMSF lend money or provide financial assistance to a member or relative of a member of the fund? **E** No Yes
- Did the SMSF receive *in specie* contributions during the year? **F** No Yes \$
- Did the SMSF make and maintain all investments on an arm's length basis? **G** No Yes
- Did the SMSF borrow for purposes that are not permissible? **H** No Yes
- Did members have the personal use of the SMSF's assets before retirement? **I** No Yes
- Did the SMSF provide money to members without a condition of release being met? **J** No Yes
- Did trustees of the fund receive any remuneration for their services as a trustee? **K** No Yes
- Are any trustees or directors currently disqualified persons as defined by SISA? **L** No Yes
- Are all SMSF assets appropriately documented as owned by the fund? **M** No Yes
- Did the SMSF carry on a business of selling goods or services? **N** No Yes
- Does the auditor provide services to the SMSF as either a tax agent, accountant or financial advisor or administrator? **O** No Yes

Section J: Other information

Forestry managed investment schemes

	Code	Year	Number
Product or private ruling information	G	H	I

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 2007–08 income year, write **2008**). **A**

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 2008*. **B**

Interposed entity election status

If the trust or fund has made, or is making, one or more interposed entity elections, write the four-digit **income year specified** of the earliest election (for example, for the 2007–08 income year, write **2008**). **C**

If revoking an interposed entity election, print **R**, and complete and attach the *Interposed entity election or revocation 2008*. **D**

Tax file number

Name of entity

Signature as prescribed in tax return

[Signature box]

Section K: **Declarations**

Penalties may be imposed for false or misleading information in addition to penalties relating to any tax shortfalls.

TRUSTEE'S OR DIRECTOR'S DECLARATION:

I declare that current trustees and directors have authorised this annual return and it is documented as such in the SMSF's records. I have received the audit report and I am aware of any matters raised. I also authorise the Tax Office to make any tax refunds to the nominated bank account (if applicable).

Authorised trustee's or director's signature

[Signature box]

Date Day / Month / Year

Preferred trustee or director contact details:

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Phone number

Email address

Non-individual trustee name (if applicable)

ABN of non-individual trustee

Time taken to prepare and complete this annual return Hrs

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:

I declare that the *Self managed superannuation fund annual return 2008* has been prepared in accordance with information provided by the trustees, that the trustees have given me a declaration stating that the information provided to me is true and correct, and that the trustees have authorised me to lodge this annual return.

Tax agent's signature

[Signature box]

Date Day / Month / Year

Tax agent's contact details

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

Tax agent's practice

Tax agent's phone number

Reference number

Tax agent number

Postal address for annual returns: Australian Taxation Office, GPO Box 9845, IN YOUR CAPITAL CITY

Capital gains tax (CGT) schedule

2008
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Use in conjunction with company, trust or fund income tax return. For instructions on how to complete this schedule refer to the publication *Guide to capital gains tax*.
Print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box.

Tax file number (TFN)

Taxpayer's name

Australian business
number (ABN)

Signature as prescribed in tax return

Part A Capital gains from CGT assets and CGT events

Non-active assets

	Capital gains-indexation method	Capital gains-discount method	Other capital gains
Shares and units (in unit trusts)	A <input type="text"/>	B <input type="text"/>	C <input type="text"/>
Forestry managed investment scheme interest	Y <input type="text"/>	Z <input type="text"/>	A <input type="text"/>
Real estate	D <input type="text"/>	E <input type="text"/>	F <input type="text"/>
Other CGT assets and any other CGT events	G <input type="text"/>	H <input type="text"/>	I <input type="text"/>
Collectables	J <input type="text"/>	K <input type="text"/>	L <input type="text"/>

Active assets

Shares and units (in unit trusts)	M <input type="text"/>	N <input type="text"/>	O <input type="text"/>
Forestry managed investment scheme interest	B <input type="text"/>	C <input type="text"/>	D <input type="text"/>
Real estate	P <input type="text"/>	Q <input type="text"/>	R <input type="text"/>
Other CGT assets and any other CGT events	S <input type="text"/>	T <input type="text"/>	U <input type="text"/>

Add amounts at A to S above and write the total at V below.

Total current year capital gains (CYCG) V

Add amounts at B to T above and write the total at W below.

W

Add amounts at C to U above and write the total at X below.

X

F

Part B Current year capital losses (CYCL) from CGT assets and CGT events - other than capital losses from collectables

Shares and units (in unit trusts)	A	<input type="text"/>
Forestry managed investment scheme interest	T	<input type="text"/>
Real estate	B	<input type="text"/>
Other CGT assets and any other CGT events	C	<input type="text"/>
Add amounts at A to C above and write the total at D below.		
Total current year capital losses (CYCL)	D	<input type="text"/>

Part D Applying capital losses against current year capital gains

	Capital gains-indexation method	Capital gains-discount method	Other capital gains
Current year capital losses applied	E <input type="text"/>	F <input type="text"/>	G <input type="text"/>
Prior year net capital losses applied	I <input type="text"/>	J <input type="text"/>	K <input type="text"/>
Capital losses transferred in applied	M <input type="text"/>	N <input type="text"/>	O <input type="text"/>
Add amounts at E to M above and write the total at Q below.		Add amounts at F to N above and write the total at R below.	
Total capital losses applied	Q <input type="text"/>	R <input type="text"/>	S <input type="text"/>

	Current year capital losses applied	Prior year net capital losses applied	Capital losses transferred in applied	
Add amounts at E, F and G above and write the total at H below.				
Total capital losses applied	H <input type="text"/>	Add amounts at I, J and K above and write the total at L below.		
		L <input type="text"/>	Add amounts at M, N and O above and write the total at P below.	
				P <input type="text"/>

Use P only for transfers from or to a foreign bank branch or permanent establishment of foreign financial entity.

F

Part E Current year capital gains (CYCG) after applying capital losses

	Capital gains-indexation method	Capital gains-discount method	Other capital gains
Non-active assets	A <input type="text"/>	B <input type="text"/>	C <input type="text"/>
Active assets	D <input type="text"/>	E <input type="text"/>	F <input type="text"/>
Add amounts at A and D above and write the total at G below.		Add amounts at B and E above and write the total at H below.	
Totals - CYCG after applying capital losses	G <input type="text"/>	H <input type="text"/>	I <input type="text"/>

Signature as prescribed in tax return

Capital gains tax (CGT) schedule 2008

A10BK08

Taxpayer name

TFN

Part F Applying the CGT discount on capital gains

Capital gains-discount method

From non-active assets J []

From active assets K []

Part G Applying the CGT concessions for small business

Capital gains-indexation method

Capital gains-discount method

Other capital gains

Small business active asset reduction L []

M []

N []

Small business retirement exemption O []

P []

Q []

Small business roll-over R []

S []

T []

F

Part H Calculating net capital gain

Add amounts at L to R above and write the total at A below.

Add amounts at J to S above and write the total at B below.

Add amounts at N to T above and write the total at C below.

Totals-CGT discount and small business concessions A []

B []

C []

Deduct the amount at A above from the amount at G in part E on page 2 and write the result at D below.

Deduct the amount at B above from the amount at H in part E on page 2 and write the result at E below.

Deduct the amount at C above from the amount at I in part E on page 2 and write the result at F below.

D []

E []

F []

Net capital gain (D + E + F) G []

Transfer the amount at G to A on your tax return.

Part I Unapplied net capital losses (UNCL) carried forward to later income years

UNCL from collectables H []

UNCL from all other CGT assets and CGT events I []

I []

Add amounts at H and I and write the total at V on your tax return.

Part J Small business 15-year exemption

Exempt capital gains J []

CGT asset or CGT event code

K []

F

Part K Scrip-for-scrip roll over for exchanging taxpayer

Roll over chosen? A Yes [] No []

Original interests cost base B []

Replacement interests market value C []

Cash and other considerations D []

Signature as prescribed in tax return

Capital gains tax (CGT) schedule 2008

A10BK08

Taxpayer name

TFN

Part L Scrip-for-scrip roll over for acquiring entity - to be completed by companies and trusts only

Acquiring entity **E** Yes No Print X in the appropriate box

Number of original entities **F**

Taxpayer TFN of original entity **G**

Number of shares/units etc issued **H**

Number of options/rights etc issued **I**

Amount of other considerations **J**

First element of cost base of interests acquired **K**

Joint choice for roll over **L** Yes No Print X in the appropriate box

Cost base-significant common stakeholder interests acquired **M**

Part M Did you have an employee share scheme in place at any time during the year? - to be completed by companies only

N Yes No Print X in the appropriate box

Part N Same majority underlying ownership and pre-CGT assets-Division 149 - to be completed by companies only

O Yes No Print X in the appropriate box **F**