

7 Electronic funds transfer (EFT)

We need your self-managed super fund's financial institution details to pay any super payments and tax refunds owing to you.

A Fund's financial institution account details

This account is used for super contributions and rollovers. Do not provide a tax agent account here.

Fund BSB number 805050

Fund account number 102390813

Fund account name

HARTLEY SILK PRIVATE SUPERFUND

I would like my tax refunds made to this account.

☒ Y

Print Y for yes
or N for no.

▶ If Y, go to C.

B Financial institution details for tax refunds

This account is used for tax refunds. You can provide a tax agent account here.

BSB number 805050

Account number 102390813

Account name

HARTLEY SILK PRIVATE SUPER FUND

C Electronic service address alias

Provide the electronic service address alias (ESA) issued by your SMSF messaging provider.
(For example, SMSFdataESAAlias). See instructions for more information.

8 Status of SMSF

Australian superannuation fund

☒ A ☒ Y

Print Y for yes
or N for no.

Fund benefit structure ☒ B ☒ D Code

Does the fund trust deed allow acceptance of
the Government's Super Co-contribution and
Low Income Super Contribution?

☒ C ☒ Y

Print Y for yes
or N for no.

9 Was the fund wound up during the income year?

☒ N

Print Y for yes
or N for no.

▶ If Y, provide the date on
which the fund was wound up

Day Month Year

Have all tax lodgment
and payment
obligations been met?

☐

Print Y for yes
or N for no.

10 Exempt current pension income

Did the fund pay retirement phase superannuation income stream benefits to one or more members in the income year?

To claim a tax exemption for current pension income, you must pay at least the minimum benefit payment under
the law. Record exempt current pension income at Label A.

☒ Y

Print Y for yes
or N for no.

▶ If N, go to Section B: Income.

▶ If Y, enter Exempt current pension income amount

☒ A

26325

☒ D

Which method did you use to calculate your exempt current pension income?

Segregated assets method

☒ B ☒ X

Unsegregated assets method

☒ C ☒ X

Was an actuarial certificate obtained?

☒ D ☐

Print Y for yes
or leave blank.

Did the fund have any other income that was assessable?

☒ E

Print Y for yes
or N for no.

▶ If Y, go to Section B: Income.

▶ If N, choosing 'N' means that you do not have any assessable income, including no-TFN
quoted contributions.

Go to Section C: Deductions and non-deductible expenses. (Do not complete Section B: Income.)

If you are entitled to claim any tax offsets, you can list
these at Section D: Income tax calculation statement.

Sensitive (when completed)