

**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  Fund account number

Fund account name

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  Account number

Account name

**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

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   DC

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  Y 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.