



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)

490 589 197

! 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

LOFTON

First given name

LANCE

Other given names

3 Date of birth Day Month Year
12 / 02 / 1965

4 Current postal address

3 PALM COURT

Suburb/town/locality

BUCASIA

State/territory

QLD

Postcode

4750

Country if outside of Australia

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

PENARNA SUPERANNUATION FUND

7 Fund Australian business number (ABN) 98 188 347 718

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.

- ☐ 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

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 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 lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or

- I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, **or**
- the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

Name (Print in BLOCK LETTERS)

[illegible]

Day

Month

Year

□ □ / □ □ / □ □ □ □

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PEYARNA SUPERANNUATION FUND

Superannuation Fund Acknowledgement

**For Receipt of Member Notice of Intent to Claim or Vary a Deduction for
Personal Super Contributions**

Name: Lance William Crofton

**Current Postal Address: PO Box 231,
BUCASIA QLD 4750**

Peyarna Pty Ltd as trustee for Peyarna Superannuation Fund acknowledges that:

Lance William Crofton has lodged a notice in accordance with Subsection 290-170(1) of the Income Tax Assessment Act 1997 of intent to claim a tax deduction of:

\$17,017.65 for contributions paid in the year ended 30 June 2020.

The Trustees have taken action to deduct the appropriate level of tax from these contributions.



Lance William Crofton (Director Trustee – Peyarna Pty Ltd)



Dr Tanya Dodman (Director Trustee – Peyarna Pty Ltd)

Date: 08/10/2020