



**Australian Government**  
**Australian Taxation Office**  
**^AWR** **^ABB**

## Self-managed superannuation fund annual return

# 2017

## 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 2017* (NAT 71287).

**!** The Self-managed superannuation fund annual return instructions 2017 (NAT 71606) (the instructions) can assist you to complete this annual return.

## TO COMPLETE THIS ANNUAL RETURN

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

S	M	I	T	H		S	T		
---	---	---	---	---	--	---	---	--	--

- Place  $\chi$  in ALL applicable boxes.

Amendment tags ^I[H - ^JHD

^IJH      ^JGY      ^JHD

## Section A: Fund information

- 1 Tax file number (TFN)** ^AAD [ ] [ ] [ ] [ ] [ ] [ ]

➤ To assist processing, **write the fund's TFN at the top of pages 3, 5 and 7.**

**!** The ATO 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. See the Privacy note in the Declaration.

- 2 Name of self-managed superannuation fund (SMSF)**

^AAU

^AAU

- 3 Australian business number (ABN)** (if applicable) ^EBN

**3 Australian business number (ABN)** (if applicable) ^EBN

- #### 4 Current postal address

^ABH

^ABH

Suburb/town

State/territory

Postcode

^AME

**^AMF**

**^APE**

- ## 5 Annual return status

Is this an amendment to the SMSF's 2017 return?

**A** No ☐ Yes ☐

Is this the first required return for a newly registered SMSF?

**B** No **^KGL**





Fund's tax file number (TFN)

     
**8 Status of SMSF**

Australian superannuation fund

**A** No**^IUB** 

Fund benefit structure

**B**  Code

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

**C** No**^IPQ** **^IOM****9 Was the fund wound up during the income year?**

No

**^FLX**

If yes, provide the date on which the fund was wound up

Day

Month

Year

**^FLY** 

/

Have all tax lodgment and payment obligations been met?

No

Yes

**^IPR****10 Exempt current pension income**

Did the fund pay an income stream to one or more members in the income year?

**^KCI**

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**.

No

Go to Section B: Income.

Yes

Exempt current pension income amount

**A** \$**^KCJ** 

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

**^KCK**

Segregated assets method

**B** 

Unsegregated assets method

**C** 

Was an actuarial certificate obtained?

**D** Yes**^KCL**

Did the fund have any other income that was assessable?

**^KFZ****E** Yes

Go to Section B: Income.

No

Choosing 'No' 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.



Place your attachments here.

## Section B: Income

**Do not complete this section** if your fund was in **full** pension phase for the **entire year** and there was **no** other income that was assessable. If you are entitled to claim any tax offsets, you can record these at Section D: Income tax calculation statement.

### 11 Income

Did you have a capital gains tax (CGT) event during the year?

**G** No **^FZS**

If the total capital loss or total capital gain is greater than \$10,000 complete and attach a *Capital gains tax (CGT) schedule 2017*.

Have you applied an exemption or rollover?

**M** No **^JZE**

Code

**^KAF**

Net capital gain **A** \$ **^AWG** , , .

Gross rent and other leasing and hiring income **B** \$ **^AIR** , , .

Gross interest **C** \$ **^AFZ** , , .

Forestry managed investment scheme income **X** \$ **^IRR** , , .

Gross foreign income

**D1** \$ **^FGI** , , .

Net foreign income

**D** \$ **^ADY** , , .

Loss

Australian franking credits from a New Zealand company

**E** \$ **^IFW** , , .

Transfers from foreign funds

**F** \$ **^IKE** , , .

Number

**^IKF**

Gross payments where ABN not quoted

**H** \$ **^FTZ** , , .

Gross distribution from partnerships

**I** \$ **^BME** , , .

Loss

\*Unfranked dividend amount

**J** \$ **^AGF** , , .

\*Franked dividend amount

**K** \$ **^AGG** , , .

\*Dividend franking credit

**L** \$ **^AGH** , , .

Code

\*Gross trust distributions

**M** \$ **^BMF** , , .

**^BMG**

#### Calculation of assessable contributions

Assessable employer contributions

**R1** \$ **^AHS** , , .

plus Assessable personal contributions

**R2** \$ **^AHT** , , .

plus \*\*No-TFN-quoted contributions

**R3** \$ **^IOQ** , , .

(an amount must be included even if it is zero)

less Transfer of liability to life insurance company or PST

**R6** \$ **^AHV** , , .

**Assessable contributions**  
(**R1** plus **R2**  
plus **R3** less **R6**)

**R** \$ , , .

#### Calculation of non-arm's length income

\*Net non-arm's length private company dividends

**U1** \$ **^AHU** , , .

plus \*Net non-arm's length trust distributions

**U2** \$ **^IPS** , , .

plus \*Net other non-arm's length income

**U3** \$ **^IPT** , , .

\*Other income

**S** \$ **^AGU** , , .

Code

**^IOR**

\*Assessable income due to changed tax status of fund

**T** \$ **^BAC** , , .

**Net non-arm's length income**  
(subject to 47% tax rate)  
(**U1** plus **U2** plus **U3**)

**U** \$ , , .

#This is a mandatory label.

\*If an amount is entered at this label, check the instructions to ensure the correct tax treatment has been applied.

**GROSS INCOME**  
(Sum of labels **A** to **U**)

**W** \$ , , .

Loss

Exempt current pension income

**Y** \$ **^AIE** , , .

**TOTAL ASSESSABLE INCOME**  
(**W** less **Y**)

**V** \$ , , .

Loss

## 12 Deductions and non-deductible expenses



```
#This is a mandatory
label.
```





Fund's tax file number (TFN)

       
Credit for interest on early payments –  
amount of interestH1 \$ **^AJL**   ,    .  Credit for tax withheld – foreign resident  
withholding (excluding capital gains)H2 \$ **^IIV**   ,    .  Credit for tax withheld – where ABN  
or TFN not quoted (non-individual)H3 \$ **^FTW**   ,    .  Credit for TFN amounts withheld from  
payments from closely held trustsH5 \$ **^JGF**   ,    .  

Credit for interest on no-TFN tax offset

H6 \$ **^JAC**   ,    .  Credit for foreign resident capital gains  
withholding amountsH8 \$ **^KIJ**   ,    .  

Eligible credits

H \$   ,    ,    ,    .    
(H1 plus H2 plus H3 plus H5 plus H6 plus H8)#Tax offset refunds  
(Remainder of refundable tax offsets)I \$ **^JIK**   ,    ,    .    
(unused amount from label E –  
an amount must be included even if it is zero)

PAYG instalments raised

K \$ **^APM**   ,    ,    .  

Supervisory levy

L \$ **^IPV**   ,    , **2 5 9** . **0 0**

Supervisory levy adjustment for wound up funds

M \$ **^KFT**   ,    ,    .  

Supervisory levy adjustment for new funds

N \$ **^KGM**   ,    ,    .  

AMOUNT DUE OR REFUNDABLE

A positive amount at S is what you owe,  
while a negative amount is refundable to you.S \$ **^APQ**   ,    ,    .    
(T5 plus G less H less I less K plus L less M plus N)

#This is a mandatory label.

Section E: **Losses****14 Losses**

**!** If total loss is greater than \$100,000,  
complete and attach a *Losses*  
*schedule 2017*.

Tax losses carried forward  
to later income yearsU \$ **^ARN**   ,    .  Net capital losses carried  
forward to later income yearsV \$ **^BRA**   ,    .  

712260917





Section F: **Member information**

**!** In Section F report all current members in the fund at 30 June.  
Use Section G to report any former members or deceased members who held an interest in the fund at any time during the income year.

MEMBER 1 ^IVK

Title: Mr Mrs Miss Ms Other ^IPI

Family name ^IPJ ^IUG

First given name ^IPK Other given names ^IPL

Member's TFN ^ISR

See the Privacy note in the Declaration.

Date of birth ^ABQ /

Contributions

OPENING ACCOUNT BALANCE \$ , , .

Employer contributions A \$ ^ISI , , .

ABN of principal employer A1 ^GWM

Personal contributions B \$ ^ISL , , .

CGT small business retirement exemption C \$ ^ISG , , .

CGT small business 15-year exemption amount D \$ ^ISF , , .

Personal injury election E \$ ^ISM , , .

Spouse and child contributions F \$ ^ISN , , .

Other third party contributions G \$ ^ISK , , .

Assessable foreign superannuation fund amount I \$ ^ISE , , .

Non-assessable foreign superannuation fund amount J \$ ^ISJ , , .

Transfer from reserve: assessable amount K \$ ^ISP , , .

Transfer from reserve: non-assessable amount L \$ ^ISQ , , .

Contributions from non-complying funds and previously non-complying funds T \$ ^JJQ , , .

Any other contributions (including Super Co-contributions and Low Income Super Contributions) M \$ ^ISD , , .

TOTAL CONTRIBUTIONS N \$ ^ISO , , .

Other transactions

Allocated earnings or losses O \$ ^ISS , , .

Loss

Inward rollovers and transfers P \$ ^ISV , , .

Outward rollovers and transfers Q \$ ^ISW , , .

Lump Sum payment R1 \$ ^KDB , , .

Code ^KDC

Income stream payment R2 \$ ^KDD , , .

Code ^KDE

CLOSING ACCOUNT BALANCE S \$ ^ISU , , .





Fund's tax file number (TFN)



In Section F report all current members in the fund at 30 June.

Use Section G to report any former members or deceased members who held an interest in the fund at any time during the income year.

**MEMBER 2**Title: Mr  Mrs  Miss  Ms  Other 

Family name

First given name

Other given names

Member's TFN

See the Privacy note in the Declaration.

Date of birth

Day

Month

Year

**Contributions**

Refer to instructions for completing these labels.

OPENING ACCOUNT BALANCE \$ 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 third party contributions **G** \$ 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** \$ Contributions from non-complying funds and previously non-complying funds **T** \$ Any other contributions (including Super Co-contributions and Low Income Super Contributions) **M** \$ **TOTAL CONTRIBUTIONS N** \$ **Other transactions**Allocated earnings or losses **O** \$ 

Loss

Inward rollovers and transfers **P** \$ Outward rollovers and transfers **Q** \$ Lump Sum payment **R1** \$ 

Code

Income stream payment **R2** \$ 

Code

**CLOSING ACCOUNT BALANCE S** \$ 

Sensitive (when completed)



712261017

### MEMBER 3

Family name

**Member's TFN**                 **Date of birth**      /   /

**!** Refer to instructions for completing these labels.

Employer contributions     **A** \$ [ ] [ ] [ ] . [ ] [ ] [ ] [ ] [ ] [ ] . [ ] [ ] [ ]

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 third party contributions    **G \$** [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

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 \$ [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ]

Contributions from non-complying funds  
and previously non-complying funds      T \$ [ ] [ ] [ ], [ ] [ ] [ ], [ ] [ ] [ ]. [ ] [ ]

Any other contributions (including Super Co-contributions  
and Low Income Super Contributions) M \$ [ ] [ ] [ ], [ ] [ ] [ ], [ ] [ ] [ ]. [ ] [ ]

**TOTAL CONTRIBUTIONS** N \$ [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

Allocated earnings or losses    O \$ [ ] . [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Inward rollovers and transfers P \$ [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Outward rollovers and transfers Q \$ [ ] . [ ] . [ ] . [ ] . [ ] . [ ] . [ ] . [ ] . [ ] . [ ]

[illegible]

Income stream payment R2 \$ ....

CLOSING ACCOUNT BALANCE    \$ - .

Loss

Code

Code

## MEMBER 4

Family name

First given name

First given name \_\_\_\_\_ Other given names \_\_\_\_\_

Member's TFN

See the Privacy note in the Declaration.

Date of birth   /   /

OPENING ACCOUNT BALANCE \$

[illegible]

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 \$ 1,789,000.00
--------------------------------	-------------------

Other third party contributions	G \$ 1,789,000 .00
---------------------------------	--------------------

[illegible]

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

[illegible]

Transfer from reserve: non-assessable amount      L \$ [ ] [ ] [ ] . [ ] [ ] [ ] [ ] [ ] [ ] . [ ] [ ]

Contributions from non-complying funds and previously non-complying funds **T \$**  ,  ,  .

Any other contributions (including Super Co-contributions  
and Low Income Super Contributions) M \$ [ ] [ ] [ ], [ ] [ ] [ ], [ ] [ ] [ ]. [ ] [ ]

**TOTAL CONTRIBUTIONS** N \$ [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

Allocated earnings or losses    O \$ [ ] . [ ] [ ] [ ] [ ] . [ ] [ ] [ ] [ ] . [ ] [ ]

Loss

Inward rollovers and transfers P \$ . . . . .

Outward rollovers and transfers Q \$

Lump Sum payment R1 \$  -  -  -  .

Code

Income stream payment R2 \$  -  -  -  .

Code

[illegible]

**!** In Section G report any former members or deceased members who held an interest in the fund at any time during the income year. Also in Section G report any other members who cannot be included at pages 6 to 9.

Account status **Code** **^KGC**

Day Month Year

**^FRF** /

**!** In Section G report any former members or deceased members who held an interest in the fund at any time during the income year. Also in Section G report any other members who cannot be included at pages 6 to 9.

**MEMBER 6**

Title: Mr  Mrs  Miss  Ms  Other

Account status

Code

Family name

First given name

Other given names

**Member's TFN**

See the Privacy note in the Declaration.

**Date of birth**
 Day  / Month  / Year 
**If deceased, date of death**
 Day  / Month  / Year 
**Contributions**

**!** Refer to instructions for completing these labels.

**OPENING ACCOUNT BALANCE \$** 

 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 third party contributions **G \$** 

 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 \$** 

 Contributions from non-complying funds and previously non-complying funds **T \$** 

 Any other contributions (including Super Co-contributions and Low Income Super Contributions) **M \$** 
**TOTAL CONTRIBUTIONS N \$** 
**Other transactions**
 Allocated earnings or losses **O \$** 

Loss

 Inward rollovers and transfers **P \$** 

 Outward rollovers and transfers **Q \$** 

 Lump Sum payment **R1 \$** 

Code

 Income stream payment **R2 \$** 

Code

**CLOSING ACCOUNT BALANCE S \$** 

Sensitive (when completed)

## MEMBER 7

## Account status

Code

[illegible]

Other given names

[illegible]

Date of birth

If deceased, date of death

Date of birth \_\_\_\_\_

Day                      Month                      Year

/   /

OPENING ACCOUNT BALANCE \$ [ ] . [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

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 \$ [ ] [ ] [ ] . [ ] [ ] [ ] [ ]

[illegible]

Spouse and child contributions    **F \$** [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

Other third party contributions     **G \$** [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ]

Assessable foreign superannuation fund amount I \$ 000,000.00

Non-assessable foreign superannuation fund amount J\$ [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] [ ] . [ ] [ ]

Transfer from reserve: assessable amount    **K \$** [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

Transfer from reserve: non-assessable amount    L \$ [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ]

Contributions from non-complying funds and previously non-complying funds **T \$**    ,    ,    .

Any other contributions (including Super Co-contributions and Low Income Super Contributions) M \$    ,    ,    .  

**TOTAL CONTRIBUTIONS** N \$ [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ] . [ ] [ ] [ ]

Allocated earnings or losses    O \$ [ ] . [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

## Loss

[illegible]

Outward rollovers and transfers Q \$ - .

[illegible]

Income stream payment R2 \$ -.

Code

Code

[illegible]

**!** In Section G report any former members or deceased members who held an interest in the fund at any time during the income year. Also in Section G report any other members who cannot be included at pages 6 to 9.

**MEMBER 8**

Title: Mr  Mrs  Miss  Ms  Other

Account status

Code

Family name

First given name

Other given names

**Member's TFN**

See the Privacy note in the Declaration.

**Date of birth**
 Day  / Month  / Year 
**If deceased, date of death**
 Day  / Month  / Year 
**Contributions**

**!** Refer to instructions for completing these labels.

**OPENING ACCOUNT BALANCE \$** 

 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 third party contributions **G \$** 

 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 \$** 

 Contributions from non-complying funds and previously non-complying funds **T \$** 

 Any other contributions (including Super Co-contributions and Low Income Super Contributions) **M \$** 
**TOTAL CONTRIBUTIONS N \$** 
**Other transactions**
 Allocated earnings or losses **O \$** 

Loss

 Inward rollovers and transfers **P \$** 

 Outward rollovers and transfers **Q \$** 

 Lump Sum payment **R1 \$** 

Code

 Income stream payment **R2 \$** 

Code

**CLOSING ACCOUNT BALANCE S \$** 

Sensitive (when completed)

## Section H: Assets and liabilities

### 15 ASSETS

#### 15a Australian managed investments

Listed trusts **A** \$ **^FNM**

Unlisted trusts **B** \$ **^FNN**

Insurance policy **C** \$ **^FNF**

Other managed investments **D** \$ **^FNG**

#### 15b Australian direct investments

##### Limited recourse borrowing arrangements

Australian residential real property

**J1** \$ **^KAE**

Australian non-residential real property

**J2** \$ **^KCV**

Overseas real property

**J3** \$ **^KEA**

Australian shares

**J4** \$ **^KEB**

Overseas shares

**J5** \$ **^KEC**

Other

**J6** \$ **^KED**

Cash and term deposits **E** \$ **^FNO**

Debt securities **F** \$ **^IPW**

Loans **G** \$ **^FNP**

Listed shares **H** \$ **^FNK**

Unlisted shares **I** \$ **^FNL**

Limited recourse borrowing arrangements **J** \$ **^JJH**

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

Residential real property **L** \$ **^FNJ**

Collectables and personal use assets **M** \$ **^JJI**

Other assets **O** \$ **^FNQ**

#### 15c Overseas direct investments

Overseas shares **P** \$ **^IPZ**

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

Overseas residential real property **R** \$ **^IQB**

Overseas managed investments **S** \$ **^IQC**

Other overseas assets **T** \$ **^IQD**

**TOTAL AUSTRALIAN AND OVERSEAS ASSETS** **U** \$

(Sum of labels **A** to **T**)

#### 15d In-house assets

**^KEE**

Did the fund have a loan to, lease to or investment in, related parties (known as in-house assets) at the end of the income year?

**A** No ☐ Yes ☐

\$ **^KEF**

#### 15e Limited recourse borrowing arrangements

If the fund had an LRBA were the LRBA borrowings from a licensed financial institution?

**A** No **^KHT**

Did the members or related parties of the fund use personal guarantees or other security for the LRBA?

**B** No **^KHU**



## 16 LIABILITIES

Borrowings for limited recourse  
borrowing arrangements

**V1** \$ **^KHV** , , , .

Permissible temporary borrowings

**V2** \$ **^KHW** , , , .

Other borrowings

**V3** \$ **^KHX** , , , .

Borrowings **V** \$ **^FOA** , , , .

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

Reserve accounts **X** \$ **^IQE** , , , .

Other liabilities **Y** \$ **^FOB** , , , .

**TOTAL LIABILITIES Z** \$ , , , .

RC 024

## Section I: Taxation of financial arrangements

### 17 Taxation of financial arrangements (TOFA)

Total TOFA gains **H** \$ **^JFA** , , , .

Total TOFA losses **I** \$ **^JFC** , , , .

## Section J: Other information

### 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 2016–17 income year, write **2017**).

**A** **^IOC**

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* 2017.

**B** **^IOD**

### Interposed entity election status

If the trust or fund has an existing election, write the earliest income year specified. If the trust or fund is making one or more elections this year, write the earliest income year being specified and complete an *Interposed entity election or revocation* 2017 for each election.

**C** **^IOF**

If revoking an interposed entity election, print **R**, and complete and attach the *Interposed entity election or revocation* 2017.

**D** **^IQI**

## Section K: Declarations



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

### Important

Before making this declaration check to ensure that all income has been disclosed and the annual return, all attached schedules and any additional documents are true and correct in every detail. If you leave labels blank, you will have specified a zero amount or the label was not applicable to you. If you are in doubt about any aspect of the annual return, place all the facts before the ATO.

### Privacy

The ATO is authorised by the *Taxation Administration Act 1953* to request the provision of tax file numbers (TFNs). We will use the TFN to identify the entity in our records. It is not an offence not to provide the TFN. However if you do not provide the TFN, the processing of this form may be delayed.

Taxation law authorises the ATO to collect information and disclose it to other government agencies. For information about your privacy go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

### 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 declare that the information on this annual return, including any attached schedules and additional documentation is true and correct. I also authorise the ATO to make any tax refunds to the nominated bank account (if applicable).

Authorised trustee's, director's or public officer's signature

Date   /   /

### Preferred trustee or director contact details:

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐ ^ABE

Family name

^ABF                 ^BAW

First given name

^ABG

Other given names

^BBB

Phone number

^BNU   ^BNV

Email address

^FLW

Non-individual trustee name (if applicable)

^ACU

ABN of non-individual trustee

^IPD

Time taken to prepare and complete this annual return ^DYF  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 2017* 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

Date   /   /

### Tax agent's contact details

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐ ^IOX

Family name

^IOY                 ^IUF

First given name

^IOZ

Other given names

^IPA

Tax agent's practice

^IPB

Tax agent's phone number

^BLI     ^BLJ

Reference number

^AWB

Tax agent number

^AAE



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