

Personal superannuation contribution deduction questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Employer _____

Employee/contractor to complete

1. Were you an employee for SG purposes at any time during the year of income? **YES/NO**

If **yes**, then go to question 2 of this questionnaire.

If **no**, then please proceed to question 3 of this questionnaire.

2. Was less than 10% of your assessable income, reportable fringe benefits total, and total of your reportable employer superannuation contributions for the year from your employment?

If **yes**, then you may be entitled to claim a deduction for personal superannuation contributions made during the income year. Please proceed to question 3.

If **no**, then a deduction for personal superannuation contributions cannot be made.

Claiming your deduction

3. If you are entitled to claim a tax deduction for personal superannuation contributions made during the year of income (e.g., because you are self-employed or have satisfied the 10% rule), please provide the following details^o:

Fund Name	Fund ABN & TFN	Account No.	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. Did you notify the trustee of the superannuation fund that you intended to claim a deduction for superannuation contributions that you made during the Income Year? **YES/NO**

If **yes**, you may be entitled to claim a deduction for the contributions.

If **no**, no deduction is available.

5. If you did make the notification referred to in Question 4, did you receive any notification from the trustee of the superannuation fund acknowledging notification? **YES/NO**

If **no**, then please contact the trustee of the fund to ensure that your notification was received.

Taxpayer's personal superannuation contribution declaration

- A. *I confirm that I wish to make the above claim for personal superannuation on the basis that I have made the above contributions during the income year;*
- B. *My tax agent has explained to me the law as it relates to claims for personal superannuation contributions; and*
- C. *I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.*

Signed.....

Dated.....

● Note:

- *If the taxpayer is under 18 years of age, they must derive income for the year from being an employee or from carrying on a business.*
- *If the taxpayer turns 75 years of age during the year, the contribution must be made within 28 days after the end of the month in which the individual reaches age 75.*
- *The contribution must be made to a complying fund.*