

**7.3 Concessional Superannuation Contributions**

		Client 1		Client 2	
Have you made any concessional contributions to any superannuation fund in the current or previous two financial years?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide full details of amount(s)		\$		\$	
Do you intend to claim a personal tax deduction for all or part of these contributions?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide full details					
Do you intend to make concessional contributions to any superannuation funds for future years?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Client 1</b>	Year 1 \$	Year 2 \$	Year 3 \$	Year 4 \$	Year 5 \$
<b>Client 2</b>	Year 1 \$	Year 2 \$	Year 3 \$	Year 4 \$	Year 5 \$

Additional details:

**7.4 Non-Concessional Superannuation Contributions**

		Client 1		Client 2	
Have you made any non-concessional contributions to any superannuation fund in the current or previous two financial years?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide full details of amount(s)		\$			
Do you intend to make non-concessional contributions to any superannuation funds for future years?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Client 1</b>	Year 1 \$	Year 2 \$	Year 3 \$	Year 4 \$	Year 5 \$
<b>Client 2</b>	Year 1 \$	Year 2 \$	Year 3 \$	Year 4 \$	Year 5 \$
Have you or do you intend to make personal non-concessional contributions which may result in entitlement to the Government co-contribution?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide full details of amount(s)		\$		\$	

Additional details:

**7.5 Other Superannuation Contributions**

Have you or do you intend to make a spouse contribution which will result in an entitlement to a tax offset?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide full details of amount(s)	\$		\$	
Has there been an excess contribution tax assessment from the Australian Taxation Office (ATO) in the past?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please provide details				

Additional details:

**Notes**