



# SMSFs: requests to adjust concessional contributions

This form notifies us that your client made concessional contributions to their SMSF.

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If you have a client who is a member of an SMSF, and they made concessional contributions in one financial year but did not allocate until the next financial year, it's important they submit the correct form to us.

To support timely and accurate processing of Request to Adjust Concessional Contribution Forms (NAT 74851), we encourage agents to lodge this form for their clients through Online Services for Agents using the [Practice Mail \(/tax-and-super-professionals/digital-services/online-services-for-agents/online-services-for-agents-user-guide/communication/practice-mail\)](#) topic:

**Topic:** Superannuation

**Subject:** Payment and transfer of superannuation holdings reserve.

This will ensure the form goes to the appropriate business area for action. Accurate lodgment reduces processing timeframes and results in faster outcomes.

For more information about this form and what records your client needs to keep, go to [Request to adjust concessional contributions \(/forms-and-instructions/self-managed-superannuation-fund-request-to-adjust-concessional-contributions\)](#).

QC 106147

**Our commitment to you**

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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