

**CLIENT ACCEPTANCE FORM**

GD & LA Edwards Superannuation Fund  
 PO Box 1141  
 BONGAREE QLD 4507

**Tax Invoice**  
 TAI-21931432  
 Ref: EDWA0022  
 27 May 2021

This *Client Acceptance Form* is your invitation to participate in the Sam Greco & Co Audit Shield service. Participation in the Audit Shield service is active the next business day upon receipt of payment. Liability limited by a scheme approved under Professional Standards Legislation. This document serves as a tax invoice/receipt upon payment.

**Details**  
 Expiry Date: 30 June 2022 at 4p.m.  
 Level of Cover: \$ 10,000.00  
 Turnover Category: Self-Managed Super Fund

Name of Entities / Individuals to be covered:  
**GD & LA Edwards Superannuation Fund**

**Payment**  
 Fee for Audit Shield service participation: \$ 290.91  
 GST Added: \$ 29.09  
Amount Due: \$ 320.00



**Privacy Statement**  
 By paying this invoice, and in the event of any claims, you authorise us to provide reasonable personal/private information about you and/or any related entity to support the claim.

12/6/21  
 J  
 ✓  
 NOMINEES

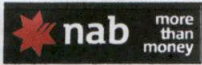
----- For cheque payments, please detach beneath this line and forward it along with your cheque payment to the address listed below. -----



**DEFT Reference Number: 404251219314325**

<p><b>BPAY</b>          To pay via BPAY, use the following details:   <b>Biller Code:</b> 253575  <b>Biller Reference:</b> 404251219314325 ✓          Contact your participating financial institution to make a payment from your cheque or savings account.</p>	<p><b>Mail</b>          Post cheques to: GPO BOX 794,          BRISBANE QLD 4001.   We ONLY accept cheques issued by Australian financial institutions. Cheques must accompany this form and are payable to: <b>Audit Shield - Sam Greco &amp; Co</b>          Please note this GPO Box is for cheque payments only.</p>	<p><b>Total Due</b>  <b>\$320.00</b></p>
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Please ensure payment for this remittance advice is made from your Super Fund only.  
 +404251 219314325< 00032000<4+



## New bill payment - bank acknowledgement

Acknowledgement details

Status report:	Paid <a href="#">?</a>
Confirmation number:	B3451775117
Created:	04/06/21
From account:	GDE NOMINEES MAIN ACC/083-088 57-079-2302
Biller code:	253575
Biller name:	AUDIT SHIELD
Customer reference no:	404251219314325
Amount:	320.00
Payment date:	04/06/21

When will my [payment be received?](#)

**End of Report**

Date 04/06/21 Time 16:17  
National Australia Bank Limited A.B.N. 12 004 044 937



CHARTERED ACCOUNTANTS

Business Focused Solutions

A.B.N. 16 230 504 491  
PO Box 354, ASPLEY QLD 4034  
Phone (07) 3263 5200 Fax (07) 3263 4830

**AUDIT SHIELD SERVICE**

GD & LA Edwards Superannuation Fund  
PO Box 1141  
BONGAREE QLD 4507

**Tax Receipt**  
TAI-21931432  
Ref: EDWA0022  
7 June 2021  
DEFT Ref No: 404251219314325

**Details**

Expiry Date: 30 June 2022 at 4p.m.  
Level of Cover: \$ 10,000.00  
Turnover Category: Self-Managed Super Fund

**Payment**

Fee for Audit Shield service participation:	\$ 290.91
GST Added:	\$ 29.09
Amount (ex surcharge):	\$ 320.00
Payment Surcharge:	\$ 0.00
Total Paid Amount:	\$ 320.00

Paid Date: \*4 June 2021

\* Participation in the Audit Shield service is active the **next business day** upon receipt of payment.

Name of Entities / Individuals to be covered:

**GD & LA Edwards Superannuation Fund**



27 May 2021

Mr G Edwards  
GD & LA Edwards Superannuation Fund  
PO Box 1141  
BONGAREE QLD 4507

**Audit Shield Service – Your participation expires on 30 June 2021**

Dear Gary,

With government revenue authorities increasingly using data matching, artificial intelligence and even social media, they are able to compare disclosures made in your lodged tax returns to those of other taxpayers or benchmarks. If a data matching check escalates to an official inquiry, investigation, review or audit, our costs in defending your position can accumulate quickly, regardless of whether any adjustments are made to your returns or not. Our Audit Shield service covers those costs (up to predetermined limits).

Audit Shield is not just for business owners and SMSFs. The Australian Taxation Office has also identified individual taxpayers who have rental properties and those with excessive work related deductions for special scrutiny.

**Benefits of our Audit Shield service:**

- **JobKeeper payment:** Audits and reviews of payments are covered (n.b. post any payments being made by the ATO only).
- **Retrospective protection:** Previously lodged returns are covered automatically.
- **Specialist fees:** Fees of any other external specialist (e.g. taxation lawyers) or relevant consultant engaged or instructed by us to assist us in a response to audit activity are also covered.
- **You have a choice:** The offering is optional, so there is no compulsion to participate.

**Important information about our Audit Shield service:**

- We hold a tax audit insurance policy in our business name. By proceeding with our Audit Shield service, we will include you and your entities in our policy.
- The policy we hold is a group policy underwritten by AAI Limited (trading as Vero Insurance), a subsidiary of Suncorp Group Limited.
- Payment is tax deductible. In addition, included in your payment is a fee payable to us. This is simply used as recovery of our administrative costs for managing this service.
- You can benefit from the service on the proviso that we are acting as your registered tax agent.
- Participation in this service is not automatic. Protection will commence on the next business day after we have received your payment, and expires on **30 June 2022**.

In order for your protection to be uninterrupted, simply provide payment as indicated on the "Client Acceptance Form" prior to 30 June 2021. We have worked closely with our service provider and Macquarie Bank to offer you an automated payment portal (DEFT Payment Systems). Please note that this portal is for Audit Shield service payments only. If you do not want to participate, you don't have to do anything but if you wish to formally decline, please follow the instructions on the "Client Decline Form".

If you have any queries with respect to this offer, refer to the enclosed FAQs or contact us.

Yours faithfully,



Sam Greco  
Sam Greco & Co.

21st March 2014  
Dear Sirs



Yours faithfully,

If you have any queries with respect to this offer, refer to the enclosed FAQs or contact us:

You wish to formally decline please follow the instructions on the 'Client Decline Form'.

Audit Shield service payments only. If you do not want to participate, you should have to do nothing but if Bank to offer you an automated payment boiler (DEFT Payment System). Please note that this boiler is for Acceptance Form, valid to 30 June 2014. We have worked closely with our service provider and insurers in order for your protection to be uninterrupted, simply provide payment as indicated on the 'Client

- we have received your payment, and expires on 30 June 2014
- Participation in this service is not automatic. Protection will commence on the next business day after
- You can benefit from the service on the proviso that we are acting as your registered tax agent used as recovery of our administrative costs for insuring this service.
- Payment is tax deductible. In addition, included in your payment is a fee payable to us. This is simply subsidised by Group Group Limited.
- The boiler we hold is a group boiler underwritten by Aviva Limited (acting as Vero Insurance) & services we will include you and your entities in our boiler.
- We hold a tax audit insurance policy in our business name. By proceeding with our Audit Shield

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- You have a choice: The offering is optional so there is no compulsion to participate. Engaged or instructed by us to assist us in a response to audit activity are also covered.
- Specialist fees: Fees of any other external specialists (e.g. tax return lawyers) or relevant consultant
- Retrospective protection: Previously lodged returns are covered automatically.
- Make by the ATO only.
- Topkeeper payment audits and reviews of payments are covered (i.e. post any payments being

Benefits of our Audit Shield service:

special scrutiny:

Individual taxpayers who have rental properties and those with excessive work related deductions for Audit Shield is not just for business owners and SMEs. The Australian Taxation Office has also identified

to your returns or not. Our Audit Shield service covers those costs (up to predetermined limits).

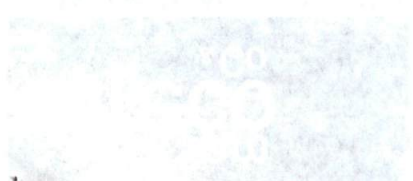
costs in defending your position can accumulate quickly regardless of whether any adjustments are made retrospectively. If a date matching check exercises to an official inquiry, investigation, review or audit, our service, they are able to compare disclosures made in your lodged tax returns to those of other taxpayers or with government revenue authorities increasingly using data matching, artificial intelligence and even social

Dear Sirs,

Audit Shield service - you can participate or not on 30 June 2014

BOICAVREE OGD 4201  
PO Box 1141  
GD & VA Edwards Superannuation Fund  
Mt C Edwards

1505 year 15



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