



Emily Cooper <emily@smsfaustralia.com>

Give to team to do -
(AM) I tried but can't add to Sorted :(

SMSF 2022 Tax Return Reminder | XBC SMSF

BPC <bpcamac@gmail.com>

2 March 2023 at 16:25

To: Ceri O'Brien <Ceri@smsfaustralia.com>

Hello Ceri,

As requested, I'm attaching bank statements for the financial year.

Also, as **there have been no changes to the investment portfolio since last filling, there are no updates to report in that regard.**

So that should be all the information needed from me to file.

Best regards,
Brenton

On 15 Feb 2023, at 17:19, Ceri O'Brien <Ceri@smsfaustralia.com> wrote:

Hi Brenton,

Now the new year is upon us, we are getting everything organised to complete the 2022 financial statements and tax returns for your SMSF.

We have most things already but just need the following for the audit:

1. Bank statements from 1 July 2021 to 30 June 2022
2. Copies of documentation of any investments made in the SMSF prior to 30 June 2022

Once received we should be able to get everything completed quickly for you.

Let me know if you have any questions.

Regards,

Ceri O'Brien**Administration Officer | SMSF Australia**

☎ 1300 392 544

✉ Ceri@smsfaustralia.com

Efficiency is doing better what is already being done – Peter F Drucker



This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error, please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

 **smf.zip**
1728K