

Warm regards
Jacqui Cusack
0427 443528

On Thu, 23 Apr 2020 at 13:39, Andrew Pullen <andy@balance.accountants> wrote:

Hi Jacqui,

Yes, you can contribute to the SMSF, directly to the bank account. In regards to the SMSF, are you able to send me the following:

1. Bank Statements for full 2019 financial year- **attached**
2. Loan statements for full 2019 financial year- **attached- exception of Dec 18 and Jan 19- not found, do you need?**
3. A copy of the lease between the Vet and the SMSF (if one exists)- **we need one. you have a template?**
4. Invoices for SMSF expenses for 2019 financial year, including Accountancy Fees, Life Insurance, and property costs (Council rates, Insurance, R & M etc). **Nil R &M, attached accountancy fees, life insurance you should already have- TAL life insurance for Paul, building insurance attached, one instalment of council rates have been paid by super fund on the 10/8/18 (notice to come from CVS) the rest of the year was decided to be paid by CVS.**
5. I have requested Bare Trust (borrowing trust) details from Baillie Simpson, if you have any details on this, please send through. **No info on this, sorry.**

Thanks

Kind regards

Andrew Pullen B.Bus CA JP
Partner

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