

**From:** [Felicity White](#)  
**To:** [Michelle](#); [Racquel Fraser](#)  
**Cc:** [Michelle Gargar](#)  
**Subject:** FW: Dixon Group - tax returns  
**Date:** Wednesday, 17 May 2023 2:59:50 PM  
**Attachments:** [image001.png](#)

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Hi there.

I received the below answers from Mark Dixon. Essentially Service Corp and Dixon Investment Trust can be written off for the super fund. Any issues with this?

With Cockatiel Place, I said we were keeping track of holding costs for CGT but if doesn't want to, no problem. I've still asked for CBA statement at 30/6/2022 and suggested any movement will be treated as drawings – hope that's ok.

Felicity

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**From:** markthomasdixon@bigpond.com <markthomasdixon@bigpond.com>  
**Sent:** Monday, May 15, 2023 4:41 PM  
**To:** Luke Andersen <luke@finprof.com.au>  
**Cc:** Felicity White <f.white@connectusaccountants.com.au>  
**Subject:** Re: Dixon Group - tax returns

Hi Luke,

On SCA, beats me as wrote to them a few times and they can find no record of any shareholding. Tried several names, all to no avail.

On Dixon Investment Trust, long dormant and effectively defunct. Have no value.

On Cockatiel, we haven't paid for costs out of Hedges – autistic son lives in house and we treat it as his private residence, although it's not. We just pay costs from wherever, is no income and will be held long term for his exclusive use.

Any easy answer?

Thanks,  
Mark

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**From:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>  
**Date:** Monday, 15 May AD 2023 16:31  
**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com) <[markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)>

**Cc:** Felicity White <[f.white@connectusaccountants.com.au](mailto:f.white@connectusaccountants.com.au)>

**Subject:** RE: Dixon Group - tax returns

Hi Mark,

Sorry to keep hassling you, but are you able to provide an update on the below FY22 tax queries, and do you have any idea how Elina is progressing?

We've secured a lodgement extension but need to finalise this asap.

Feel free to give Felicity or myself a call if you wish to discuss further.

Kind regards,

**Luke Andersen BBus GDFP CFP**

Managing Director

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**From:** Felicity White <[f.white@connectusaccountants.com.au](mailto:f.white@connectusaccountants.com.au)>

**Sent:** Friday, 5 May 2023 2:01 PM

**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)

**Cc:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>; Michelle <[michelle@finprof.com.au](mailto:michelle@finprof.com.au)>; Racquel Fraser <[racquel@finprof.com.au](mailto:racquel@finprof.com.au)>

**Subject:** RE: Dixon Group - tax returns

Hi Mark,

I was planning on giving you a call but I've managed to lose my voice. I was hoping to hear back from you on your tax return queries. Could you please provide an update on below and also how Elina is progressing so we can reconcile inter-entity balances.

Kind regards  
Felicity

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**From:** Felicity White  
**Sent:** Wednesday, April 19, 2023 9:26 AM  
**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)  
**Cc:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>; Michelle <[michelle@finprof.com.au](mailto:michelle@finprof.com.au)>; Racquel Fraser <[racquel@finprof.com.au](mailto:racquel@finprof.com.au)>  
**Subject:** RE: Dixon Group - tax returns

Hi Mark,

I hope you are well and the renovations are progressing well.

I believe the below queries are still outstanding for the 2022 tax year wrap up. If you could respond in the next week that would be much appreciated so we can meet the ATO lodgement deadlines.

If you have any questions, please let me know.

Kind regards  
Felicity

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**From:** Felicity White  
**Sent:** Tuesday, March 28, 2023 11:00 AM  
**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)  
**Cc:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>; Michelle <[michelle@finprof.com.au](mailto:michelle@finprof.com.au)>; Racquel Fraser <[racquel@finprof.com.au](mailto:racquel@finprof.com.au)>  
**Subject:** RE: Dixon Group - tax returns

Hi Mark,

The tax return deadline of mid May is looming and there are a few queries outstanding on Forever Hedges Trust and Dixon Superannuation Fund. I've sent Ellina an email on those that will require her assistance. There are a few items that we will need your assistance:

1. **Forever Hedges Trust**

- CBA bank statements for Forever Hedges Trust for any other costs that need to be included in the financial statements. This will include holding costs for the property at Cockateil Place.

2. **Dixon Superannuation Fund**

- A holding statement for investment in Service Corporation International at 30/6/22
- There has been an investment in Dixon Investment Trust of 63,735 units and 100,000 units which still show up as current, but with no market value. We need to confirm if this trust still exists and the units still exist, and the market value at year end please. I've sent this query to Ellina as well.

Many thanks  
Felicity

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**From:** Felicity White  
**Sent:** Thursday, February 2, 2023 11:56 AM  
**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)  
**Cc:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>; Michelle <[michelle@finprof.com.au](mailto:michelle@finprof.com.au)>; Racquel Fraser <[racquel@finprof.com.au](mailto:racquel@finprof.com.au)>  
**Subject:** RE: Dixon Group - tax returns

Hi Mark,

I've updated the query list below because we have forwarded the Tanunda Hill information to the auditor as Finance Professional Team had access.

See you Monday.

Kind regards  
Felicity

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**From:** Felicity White  
**Sent:** Monday, 30 January 2023 3:13 PM  
**To:** [markthomasdixon@bigpond.com](mailto:markthomasdixon@bigpond.com)  
**Cc:** Luke Andersen <[luke@finprof.com.au](mailto:luke@finprof.com.au)>; Michelle <[michelle@finprof.com.au](mailto:michelle@finprof.com.au)>; Racquel Fraser <[racquel@finprof.com.au](mailto:racquel@finprof.com.au)>  
**Subject:** Dixon Group - tax returns

Hi Mark,

We can sort out the engagement letters when you are in the office next week.

I thought I'd collate the queries in relation to your returns so we can keep the year end work progressing. Tami will need a tax return as the trust has taxable income to distribute of circa \$140,000 and the trust will recoup the carried forward capital losses in 2022.

### **Outstanding Information**

- CBA bank statements for any other costs that need to be included in the financial statements. This will include holding costs for the property at Cockateil Place.

- Confirmation of the following balances with related entities:

**Assets:**

Dixon family Investments Pty Ltd \$5,030  
Dixon Investment Trust \$246,621  
Management Living Trust \$2,083  
Dixon Kingscliff Trust \$872,893

**Liabilities**

LOA Trust (\$1,144,712)  
Dixon Retirement Trust (\$145,981)

- The superfund has been with the auditor and they have the following queries to confirm their finalisation:
  - A holding statement for investment in Service Corporation International at 30/6/22
  - A holding statement for Tanunda hill Vineyard Growers Unit [We have forwarded to auditor](#)
  - A holding statement for Tanunda hill Vineyard Shares [We have forwarded to auditor](#)
  - There has been an investment in Dixon Investment Trust of 63,735 units and 100,000 units which still show up as current, but with no market value. We need to confirm if this trust still exists and the units still exist, and the market value at year end please.

Looking forward to seeing you next week.

Kind regards  
Felicity

**Felicity White**

Client Manager

Normal working days: Monday to Thursday

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