

Re: Frank Petravic SMSF tax info

Frank Petravic <franke.ee@hotmail.com>

Thu 11/24/2022 11:00 AM

To: John Nguyen <john@tstadvisory.com.au>

📎 2 attachments (337 KB)

Budding Talents NEW 2020 lease_signed.pdf; 101-SP67246_221124-L12I6-003DI.pdf;

Hi John,

Nothing changed the way I do charging rent to tenants.

There are no rental statements but you have the monthly tax invoices
Attached lease agreement

Yes, been leased out at arm's length

Attached title search report

Kind regards,

Frank Petravic
0418 413 992

From: John Nguyen <john@tstadvisory.com.au>**Sent:** Monday, 21 November 2022 8:54 AM**To:** Frank Petravic <franke.ee@hotmail.com>**Subject:** Re: Frank Petravic SMSF tax info

Morning Frank,

Below are the queries from the auditor. This has probably come about since you transfer a lump sum for rent (which is unusual). Usually, commercial rent is paid monthly.. so they want to verify that everything is done at market.

1. In respect to property income, we seek rental statements and lease agreement to verify rental income.
2. Please also advise if property has been let out at arm's length.
3. We seek current title search report for the property to verify title of the property/any changes.

Regards,

John Nguyen

Business and Tax Consultant

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t: (02) 9757 2293

e: john@tstadvisory.com.au

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From: Frank Petravic <franke.ee@hotmail.com>

Sent: Friday, November 4, 2022 12:57 PM

To: John Nguyen <john@tstadvisory.com.au>

Subject: Re: Frank Petravic SMSF tax info

Thanks John

Kind regards,

Frank Petravic

0418 413 992

From: John Nguyen <john@tstadvisory.com.au>

Sent: Friday, 4 November 2022 9:22 AM

To: Frank Petravic <franke.ee@hotmail.com>

Subject: Re: Frank Petravic SMSF tax info

Hey Frank,

Thanks for payment. We'll submit the docs for External audit.

Once we receive the audit report, I'll let you know and we'll lodge the return

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From: John Nguyen <john@tstadvisory.com.au>

Sent: Friday, 28 October 2022, 1:33 pm

To: Frank Petravic <franke.ee@hotmail.com>

Subject: Re: Frank Petravic SMSF tax info

Hey Frank,

Thanks for the missing information. The SMSF return is now ready.

SMSF Tax Return

> The taxable for the year was \$13.2k.

- The tax payable on this is \$1.9k.
 - After factoring in ATO supervisory levies and PAYG instalments paid, there will be a Refund of **\$5,019.25**.
- > The refund is due to excess PAYG instalments, since no additional concessional contributions were made. The rollover amount from the ATO was also already taxed.

Annual GST Return

- > The GST payable for the year is **\$1,598.00**.
- > Once lodged, we will generate the payment slip from the ATO for payment.

In order to proceed with lodgement, proceed with Audit/Lodgement, please arrange the following:

1. Sign the Auditors copy.
 - I will send you a link from 'RightSignature', for you to sign electronically.
2. Pay the attached Invoice for our service.

We will then send the documents for audit and will let you know once the audit report is received/return is lodged.

Regards,

John Nguyen

Business and Tax Consultant

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From: Frank Petravic <franke.ee@hotmail.com>

Sent: Friday, October 21, 2022 1:42 PM

To: John Nguyen <john@tstadvisory.com.au>

Subject: Re: Frank Petravic SMSF tax info

Thanks John.

Kind regards,

Frank Petracic
0418 413 992

From: John Nguyen <john@tstadvisory.com.au>
Sent: Friday, 21 October 2022 1:26 PM
To: Frank Petracic <franke.ee@hotmail.com>
Subject: Re: Frank Petracic SMSF tax info

Hey Frank,

Sorry I'm in meetings all day. Just finished lunch and jumping into an appointment now.

Yes we can access client letter/notices etc. But they are not sent to us directly for us to forward to clients. As we are not a mailing service.

We would physically need to log into client file online, download an electronic copy and send. As such, we do not do this automatically for all clients, as we have over 3,000 clients. We only do so upon client request.. which is fairly rare since clients usually receive them directly via mail/access online themselves.

Attached is your payment history for instalments. As you can see, the March instalment was never paid.

John Nguyen
Business and Tax Consultant

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From: Frank Petracic <franke.ee@hotmail.com>
Sent: Friday, October 21, 2022 10:30 AM
To: John Nguyen <john@tstadvisory.com.au>
Subject: Re: Frank Petracic SMSF tax info

Hi John,

Statement attached.

Tell you the truth this ATO stuff is concerning me a lot. I don't get these especially this one for back in March???? I just paid a PAYG. Is this not the same??

Attached a grab from ATO email and says I can access these Tax notices from you. So, should you not be sending me these?

Maybe we can look at myGov so you can tell you what I see online. Please call me.

Kind regards,

Frank Petracic
0418 413 992

From: John Nguyen <john@tstadvisory.com.au>
Sent: Monday, 17 October 2022 2:45 PM
To: Frank Petracic <franke.ee@hotmail.com>
Subject: Re: Frank Petracic SMSF tax info

Hey Frank,

Are you able to send me the MCQ bank statements for the year.

You have sent the transaction history (CSV), but I need the actual statements for audit purposes.

Also, there is an outstanding instalment for the March 2022 quarter (see attached ATO history and payment slip).

John Nguyen
Business and Tax Consultant

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From: Frank Petracic <franke.ee@hotmail.com>
Sent: Friday, October 14, 2022 12:46 PM
To: John Nguyen <john@tstadvisory.com.au>
Subject: Re: Frank Petracic SMSF tax info

Hi John,

Attached:
Gas, Electricity, Council fees, Water, Levies
Macquarie bank transactions
Tennant invoices

Let me know if anything missing

Kind regards,

Frank Petracic
0418 413 992

From: John Nguyen <john@tstadvisory.com.au>
Sent: Thursday, 21 July 2022 3:00 PM
To: Frank Petracic <franke.ee@hotmail.com>
Subject: Re: Frank Petracic SMSF - property valuation

Thanks Frank.

Could you also send through the SMSF Macquarie bank statements from 1 July 2021 to 30 June 2022.

Also with regards to your outgoings, we will need invoices for all costs, since the auditor won't accept your spreadsheet only.

John Nguyen
Business and Tax Consultant

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From: Frank Petravic <franke.ee@hotmail.com>
Sent: Wednesday, July 20, 2022 8:19 AM
To: John Nguyen <john@tstadvisory.com.au>
Subject: Frank Petravic SMSF - property valuation

Hi John,

Attached:

Valuation for office for you to start preparing the 2021 SMSF returns.

Rent outgoings info including rent money deposited (65%) from Frank Petravic account to SMSF less outgoings.

For 2023 year:

Finals Tax invoice 343 to tenant as they vacated end of June sent to them in JULY - FINAL END OF LEASE STATEMENT

Electricity Gas Water bills which relate to invoice 343

Please let me know what other information you need

Kind regards,

Frank Petravic
0418 413 992

From: John Skufiris <j.skufiris@rwcss.com>
Sent: Tuesday, 19 July 2022 10:50 AM
To: Frank Petravic <franke.ee@hotmail.com>
Subject: Fwd: Service request - 790635

Frank,

Please see attached.

----- Forwarded message -----

From: **Rwcss_Printer** <info@rwre.com.au>
Date: Mon, 18 Jul 2022, 4:56 pm
Subject: Service request - 790635
To: <j.skufiris@rwcss.com>

Number of Images: 1
Attachment File Type: PDF

Device Name: Rwcss_Printer
Device Location:

