

FW: FW: Carruthers Luvera SMSF Tax FY20

David Vannetiello <david@coullandprior.com.au>

Thu 29/04/2021 10:01 AM

To: Sara Baynes <sb.acct.smsf@outlook.com>

📎 1 attachments (85 KB)

CGU Insurance.jpeg;

... and here is the rest, hopefully can complete from here.

Thanks.

David Vannetiello AIPA, ATIA, AdvDip
Managing Director

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E david@coullandprior.com.au W www.coullandprior.com.au285 St Vincent Street, Port Adelaide SA 5015PO Box 553, Port Adelaide SA 5015**Like us on Facebook for ATO updates, small business news and lodgement deadlines.**

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From: Frank Luvera [mailto:fluvera1970@gmail.com]**Sent:** Thursday, 29 April 2021 9:52 AM**To:** David Vannetiello <david@coullandprior.com.au>**Cc:** Peta Carruthers <pcarruthers1970@gmail.com>**Subject:** Re: FW: Carruthers Luvera SMSF Tax FY20

Hi David,

Attached is the CGU Insurance Tax Invoice.

On Wed, Apr 28, 2021 at 5:56 PM Frank Luvera <fluvera1970@gmail.com> wrote:

sorry, here they are.

On Wed, Apr 28, 2021 at 5:55 PM Frank Luvera <fluvera1970@gmail.com> wrote:

Hi David,

Still waiting on the Insurance stuff.

- 1) Please provide copies of the Bank SA Loan statements (Acc..207300) for the full 2020 financial year 1 July 2019 – 30 June 2020 - **See attached docs**
- 2) Please provide a copy of the 2020 CGU Insurance invoice, total paid \$233.10 - **Waiting on CGU**
- 3) **The ATO issued a cheque to the fund for \$518.15 on 10th June 2020, the deposit does not appear in the bank account, can you confirm if the deposit appeared after 30th June 2020, or was it banked into another account? - I still have the cheque, I need to cash it at a Macquarie Branch as the payee is the SMSF. My credit union wouldn't touch it.**

Will pass on the CGU invoice for the FY as soon as I get it.

thanks

Frank

On Wed, Apr 28, 2021 at 3:17 PM David Vannetiello <david@coullandprior.com.au> wrote:

Hi Frank, just chasing up my email below from 15/4.

Regards

David Vannetiello AIPA, ATIA, AdvDip
Managing Director

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From: David Vannetiello
Sent: Thursday, 15 April 2021 5:08 PM
To: Frank Luvera <fluvera1970@gmail.com>
Subject: RE: Carruthers Luvera SMSF Tax FY20

Hi Frank, hope you are well.

A few queries below to help finalize the SMSF:

- 1) Please provide copies of the Bank SA Loan statements (Acc..207300) for the full 2020 financial year 1 July 2019 – 30 June 2020

- 2) Please provide a copy of the 2020 CGU Insurance invoice, total paid \$233.10

- 3) The ATO issued a cheque to the fund for \$518.15 on 10th June 2020, the deposit does not appear in the bank account, can you confirm if the deposit appeared after 30th June 2020, or was it banked into another account?

Cheers.

David Vannetiello AIPA, ATIA, AdvDip
Managing Director

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From: Frank Luvera [<mailto:fluvera1970@gmail.com>]

Sent: Friday, 12 March 2021 8:01 AM

To: David Vannetiello <david@coullandprior.com.au>

Subject: Carruthers Luvera SMSF Tax FY20

G'day David,

I hope you're well.

Attached are the docs for the SMSF FY20, please let me know if there is anything missing.

thanks

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Regards
Frank Luvera

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Regards
Frank Luvera

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Regards
Frank Luvera

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Regards
Frank Luvera