

Re: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

glmorris <glmorris@bigpond.net.au>

Thu 24/11/2022 11:21 AM

To: Qingyi Zeng <Queenie@prcapital.com.au>

Hi Qingyi,

No, these two amounts were not investments. One was a gift divided between our kids, and the other was a catch up on pension drawdown where a couple of months were missed.

Many thanks

Leonie

Sent from my Galaxy

----- Original message -----

From: Qingyi Zeng <Queenie@prcapital.com.au>

Date: 24/11/22 9:55 am (GMT+10:00)

To: glmorris <glmorris@bigpond.net.au>

Subject: Re: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Hi Leonie,

We are finalising the tax return for your SMSF.

Would you mind confirming for us that the following transaction are the pension drawdown or investment purchase?

16/07/2021	920,000		Transfer Out Admin to 082146 561869	Ord Minnett CBA Bank Account
9/06/2022	33,800		G&L Morris, BSB 082-146, a/c 561869347	Ord Minnet Macquarie Cash Trust

If they are investment purchase, we may need further documents.

Thank you.

Kind Regards,
Qingyi Zeng
Accountant
Pacific Ridge Capital

Shop 1 366-372 Sydney Road, Balgowlah, NSW 2093 | PO Box 613, Balgowlah, NSW 2093

Phone. 02 8404 0543 | Fax. 02 8404 0544 | Website. www.prcapital.com.au**From:** glmorris <glmorris@bigpond.net.au>**Sent:** Monday, 24 October 2022 2:57 PM**To:** Qingyi Zeng <Queenie@prcapital.com.au>**Subject:** Re: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Thanks Qingyi, we'll wait to hear from you.

Leonie

Sent from my Galaxy

----- Original message -----

From: Qingyi Zeng <Queenie@prcapital.com.au>

Date: 24/10/22 12:20 pm (GMT+10:00)

To: glmorris@bigpond.net.au

Subject: Re: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Hi Leonie,

We just received the Annual statements from Ord Minnett.

Once we finalise the tax return preparation, we would make an appointment for you to see Rob and sign off the documents.

Thank you.

Kind Regards,
Qingyi Zeng
Accountant
Pacific Ridge Capital

Shop 1 366-372 Sydney Road, Balgowlah, NSW 2093 | PO Box 613, Balgowlah, NSW 2093

Phone. 02 8404 0543 | Fax. 02 8404 0544 | Website. www.prcapital.com.au



From: glmorris@bigpond.net.au <glmorris@bigpond.net.au>
Sent: Thursday, 20 October 2022 3:42 PM
To: Qingyi Zeng <Queenie@prcapital.com.au>
Subject: RE: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Thanks Qingyi,
I just didn't want to get it confused with the tax our son pays on our behalf which is a family tax trust, Rob knows all about this.
Also, do we need to see Rob re our Tax for this year?
Kind regards
Leonie

From: Qingyi Zeng <Queenie@prcapital.com.au>
Sent: Thursday, 20 October 2022 3:20 PM
To: glmorris@bigpond.net.au
Subject: Re: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Hi Leonie,

Yes, as you said, this payment is a quarterly instalment calculated by ATO.

Feel free to let us know if you have any questions.

Kind Regards,

Qingyi Zeng
Accountant
Pacific Ridge Capital

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From: glmorris@bigpond.net.au <glmorris@bigpond.net.au>
Sent: Thursday, 20 October 2022 2:58 PM
To: Qingyi Zeng <Queenie@prcapital.com.au>
Subject: RE: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Hi Qingyi,
Thanks for this reminder.
Can you just confirm something for me please. Are we now paying our Super fund tax in instalments? Hence the amount of \$5897.00 instead of approx. around \$23,000 we usually pay?
Many thanks
Leonie

From: Qingyi Zeng <Queenie@prcapital.com.au>
Sent: Thursday, 20 October 2022 11:56 AM
To: Leonie <glmorris@bigpond.net.au>
Subject: Payslip - Sep Qtr 2022- G & L MORRIS SUPERANNUATION FUND

Hi Leonie,

Hope this email finds you well.

Please find the payslip attached for your SMSF. The due day is 25/11/2022.

Feel free to contact us if you have any questions.

Kind Regards,

Qingyi Zeng

Accountant

Pacific Ridge Capital

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