

Client Service Plan – Tosh Superannuation Fund

We outline below the services we understand you require and our fee for their provision:

Service Offering

Super 7 – Taxation – Self-Managed Superannuation Fund (SMSF)

Preparation of annual financial statements and annual return for the year ended 30 June 2019 for the Tosh Superannuation Fund

Audit of the self-managed superannuation fund

Preparation of Transfer Balance Cap Reporting for the year ended 30 June 2020

Preparation and electronic lodgement of annual ASIC trustee company statement

Our fixed fee for the above SMSF taxation offering is \$5,000.00 plus GST.

Summary of invoicing & payment terms:

Service Offering	Payment Type	Total Fees	Terms
Taxation	Payment on completion	\$5,000.00 Plus GST	A tax invoice will be issued on completion with 14 day payment terms.

Client Agreement

- I have read and agree to abide by the terms of this Engagement Letter, including the Schedule of Services and Fees, Commitment Statement and Terms of Business.
- I am aware that you will provide most reports and documents to me in electronic form unless I specifically request otherwise.
- I confirm that I am giving you authority to act on my behalf to receive and send correspondence for me any associated entities, from/to the ATO, and other regulatory bodies.
- In order to obtain all information required to complete my work, I am also giving you authority to communicate with my financial planner, risk insurer or insurance broker, bankers, solicitors, investment advisors, stock brokers and finance companies as may be applicable. You have the authority to contact them and obtain any relevant information to complete this assignment. I will provide the appropriate contact details as needed.

I am signing this as an authorised representative of all entities and people to whom SiDCOR is providing services.

Signed: _____

Name: _____

Date: _____



Jennifer Firth

7.8.19