

Brenda Wishey

From: PPS <pps@burrell.com.au>
Sent: Tuesday, 16 January 2024 10:58 AM
To: Brenda Wishey
Cc: PPS
Subject: RE: MAURICE J COSTELLO (DENTAL) PTY LTD SUPERANNUATION FUND - Additional Info 2023

Hi Brenda,

Angus has confirmed this withdrawal should have been a lump sum withdrawal from Maurice Costello's 2011/12 Pension account 36% tax free.

If you require anything else, please let us know.

Kind Regards,
Amy

PPS



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From: Brenda Wishey <BrendaW@virtusuper.com.au>
Sent: Monday, 15 January 2024 3:18 PM
To: PPS <pps@burrell.com.au>
Subject: RE: MAURICE J COSTELLO (DENTAL) PTY LTD SUPERANNUATION FUND - Additional Info 2023

Hi Amy

Can you confirm that the withdrawal of \$415,000 on 16/3/2023 was a lump sum withdrawal?

Kind regards
Brenda



Brenda Wishey
Senior Accountant
VIRTU | self managed super specialists
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From: PPS <pps@burrell.com.au>
Sent: Wednesday, January 3, 2024 11:42 AM
To: Brenda Wishey <BrendaW@virtusuper.com.au>
Subject: RE: MAURICE J COSTELLO (DENTAL) PTY LTD SUPERANNUATION FUND - Additional Info 2023

Hi Brenda,

Please find attached all required documents. Please note the Tax Statement for Equity Trustees is under YTMALD.

Let us know if you require anything further.

Thanks,
Amy

PPS



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From: Brenda Wishey <BrendaW@virtusuper.com.au>

Sent: Tuesday, 2 January 2024 7:28 AM

To: PPS <pps@burrell.com.au>

Subject: MAURICE J COSTELLO (DENTAL) PTY LTD SUPERANNUATION FUND - Additional Info 2023

Good morning Team and Happy New Year

We require the below additional documentation for Costello:

1. Annual Tax Statements for year ending 30th June 2023 for
 - a. Walter Scott Global Equity Fund
 - b. Equity Trustees Limited
2. Council rates
 - a. One invoice for \$2,058.60 (either August 2022 or February 2023)
3. Property Insurance Premium Notice for \$300 (April 2023)
4. Financials for the year ending 30th June 2023 for
 - a. BWET
 - b. BSMART
 - c. CPDF

If you have any questions, please do not hesitate to contact us.

Kind regards
Brenda



Brenda Wishey
Senior Accountant

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We are closed from 5pm on Thursday 21st December and returning Monday 8th January.

We wish you a very Merry Christmas and a Happy New Year!

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