

**Elizabeth Meiklejohn**

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**From:** Alex Robertson <AlexR@mtaccountants.com.au>  
**Sent:** Tuesday, 7 June 2022 3:51 PM  
**To:** Elizabeth Meiklejohn  
**Cc:** Stephanie Natividad  
**Subject:** PED01

Hi Liz

Nigel would like to contribute \$65k concessional into his SMSF for FY22. Nigel would also like to make a non-concessional contribution.

Jon would also like to contribute \$65k concessional into his SMSF for FY22. Can Luella also be added to Jon's SMSF for FY22? Luella would also like to contribute \$65k concessional for FY22.

Please let me know, if you have any queries.

Cheers

Alex

Expenses paid personally  
taken up as a non concessional  
contribution

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



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financial success, and freedom of choice*



**Alex Robertson** | Director

☎ 07 3422 8000

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## Chaitra Ramesh

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**From:** Elizabeth Meiklejohn  
**Sent:** Monday, 13 June 2022 7:50 AM  
**To:** Chaitra Ramesh  
**Subject:** FW: N Pedersen Super Fund

Hi Chai

Can you please save this email down and create a C1aa workpaper?

PED01s

Thanks



**Elizabeth Meiklejohn** SSA CA  
Senior Associate

**VIRTU** | *self managed super specialists*  
1454 Logan Road, Mount Gravatt Q 4122



07 3349 1452



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**From:** Nigel Pedersen <Nigel.Pedersen@baywood.com.au>  
**Sent:** Friday, 10 June 2022 10:37 AM  
**To:** Elizabeth Meiklejohn <ElizabethM@virtusuper.com.au>  
**Cc:** Alex Robertson <AlexR@mtaccountants.com.au>; Jonathan Pedersen | Narangba Timbers <Jonathan.Pedersen@narangbatimbers.com.au>  
**Subject:** RE: N Pedersen Super Fund

Hi Liz,

Following tax planning meeting with Alex, I only intend to make a \$65k concessional contribution before June 30<sup>th</sup>.

Best Regards,

**Nigel Pedersen**  
Director at **Baywood**

P. (07) 4123 3455 E. [nigel.pedersen@baywood.com.au](mailto:nigel.pedersen@baywood.com.au)

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**From:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto:ElizabethM@virtusuper.com.au)>  
**Sent:** Wednesday, 16 March 2022 12:37 PM  
**To:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Subject:** N Pedersen Super Fund

Hi Nigel

Just emailing to check that you have received the N Pedersen Super Fund establishment paperwork?

The next steps are as follows:

1. Nigel to sign the establishment paperwork and return the orange section to Liz
2. Liz to apply for an ABN & TFN
3. Nigel to open a bank account for the super fund
4. Liz & Nigel to arrange for the cash in the P & T Pederson Super Fund to be transferred across
5. Nigel to make super contributions – please discuss with Liz and Alex first
6. An offer can be made on a property – please discuss with Liz first

Please call if you would like to discuss.

Kind regards

Liz



**Elizabeth Meiklejohn** SSA CA  
Senior Associate

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**From:** Elizabeth Meiklejohn

**Sent:** Tuesday, 1 March 2022 12:37 PM

**To:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>

**Subject:** RE: Statement of Advice

Thanks Nigel!

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**From:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Sent:** Tuesday, 1 March 2022 12:33 PM  
**To:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto:ElizabethM@virtusuper.com.au)>  
**Subject:** RE: Statement of Advice

Hi Liz, great minds think alike 😊

Best Regards,

**Nigel Pedersen**  
Director at **Baywood**

**P.** (07) 4123 3455 **E.** [nigel.pedersen@baywood.com.au](mailto:nigel.pedersen@baywood.com.au)

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**From:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto:ElizabethM@virtusuper.com.au)>  
**Sent:** Tuesday, 1 March 2022 12:27 PM  
**To:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Subject:** FW: Statement of Advice

Hi Nigel

Just emailing to see how you are going with signing the 'authority to proceed' and the 'consent to act'?

Please call me if you would like to discuss.

Kind regards

Liz



Elizabeth Meiklejohn SSA CA



Senior Associate

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**From:** Elizabeth Meiklejohn  
**Sent:** Thursday, 24 February 2022 8:04 AM  
**To:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Subject:** FW: Statement of Advice

Hi Nigel

Are you on the road today?

Is there a suitable time that I can call?

My mobile number is 0412155580.

Kind regards

Liz

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**From:** Elizabeth Meiklejohn  
**Sent:** Thursday, 17 February 2022 3:28 PM  
**To:** Nigel Pedersen <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Subject:** FW: Statement of Advice

Hi Nigel

I just tried to call and left a message.

I will call again on Monday to run through the Statement of Advice. Does 1pm suit you for the phone call?

Kind regards

Liz

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**From:** Elizabeth Meiklejohn

**Sent:** Wednesday, 16 February 2022 2:15 PM

**To:** 'Nigel Pedersen' <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>

**Subject:** Statement of Advice

Hi Nigel

I am pleased to attached your Statement of Advice to establish a self managed super fund.

I will give you a call tomorrow morning to run through the advice.

The next steps are as follows:

1. Nigel to tick and sign the authority to proceed on page 22 & 23 and return to my office
2. Nigel to sign the "consent to act" as director form attached
3. Liz to order the company and super fund
4. Nigel to sign the establishment paperwork
5. Liz to apply for an ABN & TFN
6. Nigel to open a bank account for the super fund
7. Liz & Nigel to arrange for the cash in the P & T Pederson Super Fund to be transferred across
8. Nigel to make super contributions – please discuss with Liz and Alex first
9. An offer can be made on a property – please discuss with Liz first

Do you have a director ID number?

Talk to you tomorrow.

Kind regards

Liz

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**From:** Elizabeth Meiklejohn  
**Sent:** Thursday, 10 February 2022 2:10 PM  
**To:** 'Nigel Pedersen' <[Nigel.Pedersen@baywood.com.au](mailto:Nigel.Pedersen@baywood.com.au)>  
**Cc:** Alex Robertson <[AlexR@mtaccountants.com.au](mailto:AlexR@mtaccountants.com.au)>  
**Subject:** SMSF establishment

Hi Nigel

I just tried to call and left a message.

Alex Robertson has asked me to get in contact with you about establishing a self managed super fund. Below is some information about the establishment process and the costs involved.

- At law, establishing an SMSF is considered to be regulated financial advice, which requires that a licensed adviser (myself) prepares a Statement of Advice in relation to that establishment. I need to satisfy myself that it is in your best interests to establish that fund, versus staying where you are at the moment or moving to a different fund.
  - Once we have proceeded through the SOA process, we can then move to establish your new SMSF. That does not take very long (a week, at most).
  - At that point, we then apply for the new fund's tax file number and Australian business number.
  - Once those numbers have been issued, the new fund can set up a bank account.
  - After the bank account is established, you can roll the money from the P & T Pedersen Super Fund to your new Fund.
  - You can then look to make super contributions and invest those moneys.
  - Virtu can prepare all of the year end financial statements, tax return, member benefit statements, minutes of meeting, investment strategy, audit, etc which is required to satisfy the fund's legal requirements.

As to the fees, my Statement of Advice fee would be \$1,100 (inc GST) and the cost to establish the super fund (including trust deeds, member applications, TFN, ABN, etc) would be \$1,100. The cost for a corporate trustee is \$1,540. So, all up the establishment cost is \$3,740.

As to the ongoing accounting and audit fees, for a Fund with a property, our accounting and audit fee would be approximately \$2,530 (inc GST) per year. The will also be the annual ASIC fees of around \$380 per year.



To get the ball rolling please email through the following information:

- Completed fact find – see attached
- Drivers license (for anti-money laundering purposes)
- A name for the Super Fund
- A name for the Trustee Company

Finally, I have attached my Financial Services Guide (FSG). I will give you a call next week to run through the FSG and discuss your plans.

Talk next week.

Kind regards

Liz