

Anni - Can you do the two rollovers in the email chain for Junting & Qiuhua?
(AM) Not sure if need to say anything re 70K contribution?

SMSF property

Lu Junyi <lujunyi2000@yahoo.com>
Reply-To: Lu Junyi <lujunyi2000@yahoo.com>
To: Emily Cooper <emily@smsfaustralia.com>

20 January 2023 at 14:20

Thanks Emily

Please do \$70k concessional contribution for each person, \$140,000 together.

Regards

Junyi

Sent from Yahoo Mail on Android

On Fri, 20 Jan 2023 at 14:20, Emily Cooper <emily@smsfaustralia.com> wrote:

No problem at all - I will lodge the requests and send through the details for your records.

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Fri, 20 Jan 2023 at 13:59, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Thanks Emily,

Our personal accountant believes as the Australia Super Account is not active for a period of time, Qiuhua's account maybe has been close. The balance was transferred out from Super fund account with ATO now \$2102.92. Are you able to request Qiuhua's fund transfered into SMSF account?

YAN, QIUHUA

TFN 976 560 444

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Summary

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Fund details

The super fund accounts shown are based on what has been reported to the ATO by your super fund.

- > The **reported super balance** may be different to your [total superannuation balance](#).
- > If you are considering changing funds or have received an underperformance letter from your fund, [compare super](#).

Account name	Balance	As at
ATO held super	\$2,102.92	19/01/2023

Unclaimed superannuation
\$2,102.92

Unclaimed superannuation monies are amounts that superannuation providers are required to pay to us twice a year or as required by law.

There are eight types of unclaimed super money:

- > member who is 65 years or older

Regards
Junyi

Sent from Yahoo Mail on Android

On Fri, 20 Jan 2023 at 12:35, Emily Cooper
<emily@smsfaustralia.com> wrote:

I shall see what I can do - the ATO usually records the information to the individual rather than the superannuation fund so I may not have any luck but it won't hurt to try!

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

☎ 0481 001 746

✉ emily@smsfaustralia.com

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On Fri, 20 Jan 2023 at 12:42, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Yes Emily

We can do \$70k from each person. Please roll the Australian Super amount into SMSF

I could not find my mother in law's super. Are you able to see from your system? Our personal accountant could not locate Qihua's super on ATO website.

Regards
Junyi

Sent from Yahoo Mail on Android

On Fri, 20 Jan 2023 at 11:00, Emily Cooper
<emily@smsfaustralia.com> wrote:

Hi Junyi,

I can only see the confirmation for Junting - did they send through one for Qihua?

Assuming hers is the same then there will be no problem with the \$70,000 contributions to each of them and I can process on the SMSF side for you accordingly 😊

We can also request the Australian Super amount to be rolled into the SMSF for you. Did you want me to lodge that request today for you?

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

☎ 0481 001 746

✉ emily@smsfaustralia.com

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On Thu, 19 Jan 2023 at 14:36, Lu Junyi <lujunyi2000@yahoo.com> wrote:

Hi Emily

Please refer to attached photo

HE, JUNTING

TFN
996 253 186

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Lodgments

Super

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Carry-forward concessional contributions

If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met.

The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made.

The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

Total superannuation balance at 30 June 2021

\$2,181.04

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at 07 November 2022

Unused concessional contributions available to carry forward

Eligible

\$72,957.50

Eligible to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2021.

Show details

I have checked with personal accountant. This is what accountant suggests to make \$70k concessional contribution from each person, \$140,000k together. Are you able to arrange this?

Are you able to merge Australian super fund balance into SMSF?

HE, JUNTING

TFN
996 253 186

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Super

Business

Fund details

The super fund accounts shown are based on what has been reported to the ATO by your super fund.

> The **reported super balance** may be different to your [total superannuation balance](#).

> If you are considering changing funds or have received an underperformance letter from your fund, [compare super](#).

Account name	Balance	As at
AUSTRALIANSUPER	\$2,082.49	30/06/2022

Date reported
30 June 2022

Account opened
19 September 2018

Fund name
THE TRUSTEE FOR AUSTRALIANSUPER

Fund ABN
65714394896

Unique superannuation identifier (USI)
STA0100AU

Member account number
1072862728

Recent contribution
No

Insurance
No

Fund website
[Your fund website](#)

Regards
Junyi

Sent from Yahoo Mail on Android

On Thu, 19 Jan 2023 at 9:34, Emily Cooper
<emily@smsfaustralia.com> wrote:

Hi Junyi,

They will need to check with their personal tax accountant. That accountant can download a report from the ATO portal for them that specifies exactly how much concessional and non concessional they will be able to put into super and will also know their personal situation in more detail in case it will affect anything else they have going on.

We can set it up to then track the details in our system but just need that ATO report so we can confirm the correct amounts.

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Wed, 18 Jan 2023 at 11:57, Lu Junyi <lujunyi2000@yahoo.com> wrote:

Hi Emily

My last financial year income is a bit high. My parents in law have not made any concessional contribution in the past. Can they claim maximum amount of concessional contribution including the amount unused during the previous financial years? Can they claim \$75,000 concessional super contribution from each person, \$150,000 together?

Regards
Junyi

On Tuesday, 10 January 2023, 03:56:21 pm AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

No problem - as soon as you confirm the details we should be able to finalise the SMSF for you 😊

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Tue, 10 Jan 2023 at 15:08, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Thanks Emily

I will confirm with my accountant after confirming family trust distribution

Regards
Junyi

Sent from Yahoo Mail on Android

On Tue, 10 Jan 2023 at 14:22, Emily Cooper
<emily@smsfaustralia.com> wrote:

Hi Junyi,

You can claim \$27,500 each (\$55,000 as a couple) as a personal deduction - less any employer contributions (which it doesn't look like you have). You may be able to claim more depending on what you have used in previous years - your personal accountant will be able to confirm this from the ATO.

There is also an non-concessional contribution cap of \$110,000 each per year - you can't claim this one as a tax deduction but you also won't pay tax on this type.

I think the best strategy will be for your personal accountant to confirm the amount you will need to claim as a tax deduction based on the distributions from your family trust. I can then record everything to match and prepare the paperwork on the SMSF side for you.

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

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✉ emily@smsfaustralia.com

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On Mon, 9 Jan 2023 at 16:59, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily

Please see reply below in red

On Monday, 9 January 2023, 03:36:17 pm AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

Hi Junyi,

I was just typing out an email to you as this came in! Must be reading my mind!

We have finished working through everything and I just need you to confirm the following for me:

1. I have documents for the Establishment Fee and the Property deposit but can't see where these were paid from the SMSF bank account. We these paid from a personal account? If so, would you like me to record these as a contribution to the Fund? **These fund came from a personal account**

account, and transferred to a SMSF bank account to make the property purchase. I have attached a copy of SMSF statement in this email. But fund is originally from personal account as contribution

1. There are the following contributions I just need to confirm who they are for:
- 15/02/2022 \$1,000.00 Non Concessional

22/02/2022 \$40,000.00 Non Concessional

23/02/2022 \$38,000.00 Non Concessional

24/02/2022 \$30,000.00 Non Concessional

25/02/2022 \$40,000.00 Non Concessional

28/02/2022 \$3,000.00 Goldenwater Foun, Concessional

28/02/2022 \$20,000.00 Non Concessional

28/02/2022 \$40,000.00 Non Concessional

01/03/2022 \$40,000.00 Concessional

02/03/2022 \$40,000.00 Super Contributions

10/03/2022 \$211.83 CBA Mortimer (personal to Junting He?) This is from solicitor account for purchase refund of extra payment during settlement

▪
2. Are the concessional contributions employer contributions or will these be claimed as a personal tax deduction?

Once confirmed I will be able to get everything finalised for you. Claim as personal tax deduction. How much concessional contribution can we claim the most for a couple at our age?

28/02/2022 \$3,000.00 Goldenwater Foun, Concessional
01/03/2022 \$40,000.00 Concessional
02/03/2022 \$40,000.00 Super Contributions (not sure claim as concessional or non concessional, we may need to talk to our accountant base on the income distributed family trust)

Let me know if you have any questions.

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

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On Mon, 9 Jan 2023 at 15:38, Lu Junyi <ljunyi2000@yahoo.com> wrote:

Hi Emily,
Any update on the progress?

Regards
Junyi

On Thursday, 24 November 2022, 12:46:53 pm AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

Hi Junyi,
Still working through it all at the moment - I'm aiming to have it all done for you in the next couple of weeks.

Regards

Emily Cooper
SMSF Accountant | SMSF Australia

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✉️ emily@smsfaustralia.com

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On Wed, 23 Nov 2022 at 12:51, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily

Have we lodged the tax claim for my property in caboolture?

Regards
Junyi

Sent from Yahoo Mail on Android

On Tue, 8 Nov 2022 at 9:08, Emily Cooper <emily@smsfaustralia.com> wrote:

Hi Junyi,

You will need to be still classed as a resident to have an SMSF, but you are able to be temporarily overseas for up to two years.

As long as you meet these requirements, you are still able to arrange the sale of the property without physically being in the country 😊

Regards

Emily Cooper
SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Mon, 7 Nov 2022 at 20:05, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Thanks Emily

If I am going to overseas for a year, could I still keep the property under SMSF? Or it only requires owner to b Australia when sell the property under SMSF?

Regards
Junyi

On Monday, 7 November 2022, 09:38:29 am AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

Hi Junyi,

As long as the property is not under an LRBA structure (which you don't have) there is no reason you can't subdivide.

Just ensure that the SMSF pays all the expenses and everything is at arm's length as per the usual compliance requirements. Aside from that you should have no issues 😊

Let me know if you need any assistance with it.

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

☎ 0481 001 746

✉ emily@smsfaustralia.com

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On Sun, 6 Nov 2022 at 15:35, Lu Junyi <lujunyi2000@yahoo.com> wrote:

Hi Emily

Our property under the SMSF has the potential to split the land, is it compliant to SMSF legislation to do land subdivision? There is no mortgage on this property.

Regards
Junyi

On Thursday, 20 October 2022, 09:19:14 am AEST, Lu Junyi <lujunyi2000@yahoo.com> wrote:

Great, Emily

Thanks
Junyi

Sent from Yahoo Mail on Android

On Thu, 20 Oct 2022 at 9:15, Emily Cooper
<emily@smsfaustralia.com> wrote:

Hi Junyi,

You are now on our lodgement list which means you should now have until 28 February 2023 to finalise the lodgement 😊

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

☎ 0481 001 746

✉ emily@smsfaustralia.com

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On Wed, 19 Oct 2022 at 16:48, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily

Have we lodged the notification to ATO? I received a msg before saying lodgment needs to be done by end of October.

Regards
Junyi

On Friday, 14 October 2022, 08:59:44 am AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

Hi Junyi,

The ASIC bills come to us as your ASIC agent and we check them, make sure they are correct, and pass them onto you.

And it costs you absolutely nothing extra as part of our annual service fee 😊

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Thu, 13 Oct 2022 at 18:04, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily

Regarding the company ASIC annual fee, will this be emailed or posted to me directly for the future payment? How much do you charge if ASIC renewal bill emailed to you directly?

Regards
Junyi

On Thursday, 13 October 2022, 03:32:06 pm AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

At the moment no, but I will let you know if I come across anything 😊

Regards

Emily Cooper

SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Thu, 13 Oct 2022 at 15:45, Lu Junyi <lujunyi2000@yahoo.com> wrote:
All good, do you need anything else?

Regards
Junyi

On Thursday, 13 October 2022, 01:31:35 pm AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

Thanks Junyi! It was hiding from me 😊
I have the docs now.

Regards

Emily Cooper
SMSF Accountant | SMSF Australia

📞 0481 001 746

✉️ emily@smsfaustralia.com

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On Thu, 13 Oct 2022 at 13:52, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily,

Did you see these links in the previous email regarding the deed? They are very big, so I have to upload to google drive and email you the link

←

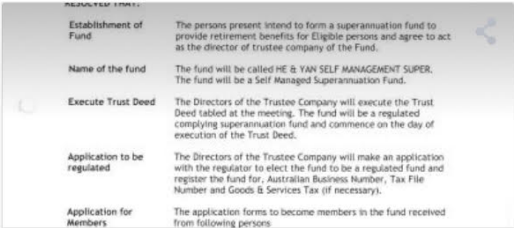
Re: Fw: SMSF property

[HEJU002 0121 Tdeed\(s\).pdf](#)



 HEJU002 0121 Tdeed(s).pdf

[HEJU002 0121 ISD-SF\(s\).pdf](#)








 HEJU002 0121 ISD-SF(s).pdf

[HEJU001 0121 Constitution\(s\).pdf](#)



 HEJU001 0121 Constitution(s).pdf

	Balance Funds Calculation for Settlement	
1		
2	Clients: He & Yan SMSF Pty Ltd AS TRUSTEE for He & Yan Self Management Super	45 Mortimer Street, Caboolture
3		
4		
5		
6		
7		
8	Balance Settlement payable to seller based on the settlement statement	\$318,593.99

- Delete
- Archive
- Move
- Reply all
- More

Regards
Junyi

Sent from Yahoo Mail on Android

On Thu, 13 Oct 2022 at 13:04, Emily Cooper
<emily@smsfaustralia.com> wrote:

Hi Junyi,

Those were all documents relating to the property, but we actually need the SMSF deed - you would have received documentation for signature upon set up.

We also need details of your SMSF Trustee company as well (He & Yan SMSF Pty Ltd).

Thanks.

Regards

Emily Cooper
SMSF Accountant | SMSF Australia

☎ 0481 001 746
✉ emily@smsfaustralia.com

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On Thu, 13 Oct 2022 at 10:48, Lu Junyi <lujunyi2000@yahoo.com> wrote:
Hi Emily,

Is this what you are after? Please refer to email below sent last month.

Regards
Junyi

Sent from Yahoo Mail on Android

----- Forwarded message -----
From: "Lu Junyi" <lujunyi2000@yahoo.com>
To: "Emily Cooper" <emily@smsfaustralia.com>
Cc:
Sent: Fri, 23 Sep 2022 at 20:55
Subject: Re: SMSF property
Hi Emily,

As requested, please see the attached documents. If you need anything else, please let r know.

Refer to bank statement, all the transactions on page 2 and page 3 are super contributor


11 Mar 2022 11 Mar 2022 Cash Management Account
Direct Credit from CBA ,
Refund 45 Mortimer
Deposit \$1,538.09 (refund from solicitor due to surplus fund)

10 Mar 2022 10 Mar 2022 Cash Management Account
Direct Credit from CBA , 49
Mortimer
Deposit \$211.83 (Super self contribution)

02 Mar 2022 02 Mar 2022 Cash Management Account
Payment to Tenet Legal - 45 mortimer

street
Payment -\$331,189.00 (Fund required from solicitor for settlement)

[HEJU002 0121 Tdeed\(s\).pdf](#)

 **HEJU002 0121 Tdeed(s).pdf**

[HEJU002 0121 ISD-SF\(s\).pdf](#)

 **HEJU002 0121 ISD-SF(s).pdf**

[HEJU001 0121 Constitution\(s\).pdf](#)

 **HEJU001 0121 Constitution(s).pdf**

Regards
Junyi
0433 135 021
On Thursday, 15 September 2022, 08:45:57 pm AEST, Lu Junyi <lujunyi2000@yahoo.com> wrote:

I will try get everything back to you next week.

On Monday, 12 September 2022, 08:31:36 am AEST, Emily Cooper <emily@smsfaustralia.com> wrote:

All still the same as the conversation you had on Google with the team yesterday 😊

Software Engineer
@ - 10:00 AM

澳房之呂

If there is one or two properties then will be \$1,600+gst presuming it has no contraventions 😊

澳房之呂

\$1600 plus gst for property under smsf, does this include accountant fee, auditing fee and software costs?

Yes it does

澳房之呂

what documents do you need to go ahead?

If you can email us the details of your fund, copy of the Smsf deed, last years financials and tax return we will be in touch tomorrow. Best to email directly to our director Emily Cooper, emily@smsfaustralia.com - I will let her know the background from our conversation today!

澳房之呂

ok Thanks this smsf only set up early this year. Have not done any tax return in the previous years

No worries, in that case the Smsf deed, tax file number of the fund and the bank statements for all Smsf accounts from inception to now would be ideal for us to start with. We will also need all receipts for expenses relating to the property and the purchase contract and settlement statement for the property purchase

澳房之呂

OK will do. Normally how long takes to complete the tax lodgement for the smsf property

Depends on how complete the information is etc, I would aim for 3-4 weeks from when we get all the information but once you are on our lodgement list the due date is not till 28/2/23 as a first year Smsf tax return. For future years this due date extends to 31/5 for compliant funds

澳房之呂

Noted. In this current financial year if I do few share trading under smsf, how would this increase your fees?

It shouldn't have any effect

澳房之呂

Thanks I will email Emily. My name is Junyi

Thanks Junyi, It has been a pleasure to chat with you 😊

29 min • Delivered

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SMSF Accountant | SMSF Australia

 emily@smsfaustralia.com



Thanks
Junyi

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Balance Funds Calculation for Settlement		
Client: He & Yan SMSP Pty Ltd AS TRUSTEE for the	146 Motenar Street, Caboolture	
& Yan Self Management Super		
Balance Settlement payable to seller based on the settlement statement		\$10,850.99
Plan		
1) Payout fee	\$17.50	
2) Life insurance fee estimate	\$165.00	
3) Transfer duty	\$10,150.00	
Less trust monies	\$201,189.90	
balance to be refunded		- \$1,558.91

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