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Elizabeth Meiklejohn

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Virtu Super Pty Ltd ACN 134 260 512

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From: Elizabeth Meiklejohn
Sent: Monday, 13 June 2022 12:17 PM
To: Alan Lawton <lawtontate@gmail.com>
Cc: Chaitra Ramesh <ChaitraR@virtusuper.com.au>
Subject: RE: Tax

Hi Alan,

We will need the following information for the 2022 year:

- a. Please confirm that the following amounts will be tax deductible super contributions for Roslyn

14/03/2022	CASH DEPOSIT, total value \$750	750.00	Ros super contribution \$6,204
24/01/2022	CASH DEPOSIT, total value \$620	620.00	
16/11/2021	CASH DEPOSIT, total value \$880	880.00	
4/08/2021	CASH DEPOSIT, total value \$710	710.00	
10/02/2022	Accounting Fees paid personally	2,090.00	
8/02/2022	2021 tax liability paid personally	1,018.00	

- b. Please provide paperwork/details of the following amounts:

Date	Amount	Description
23/02/2022	(\$136)	R&P FOOTY 21 3RD RINGWOPLYPT
16/05/2022	\$5,000	Transfer To A M R S Lawton NetBank
8/06/2022	\$5,000	Transfer to other Floor

- c. Bank statements as at 30 June 2022 for the following bank accounts – not available until mid-July
- CBA Cash account 21610873
- d. A copy of the CommSec annual statement and portfolio valuation for FY 22 (usually expected mid-july).

My colleague Chai will give you a call about the amounts in 'b'.

Regards,

From: Chaitra Ramesh
Sent: Monday, 20 June 2022 2:30 PM
To: Elizabeth Meiklejohn
Subject: RE: Tax

Hi Liz,

I spoke to Alan last week. He said that –

- a. Was a footy win that they regularly transfer into the super fund
- b. B&C – sale of shares – He couldn't remember what it was, so I requested him to send the paperwork for the sale of shares. He said he will respond back to you email this week.

Regards,
Chai



Chaitra Ramesh

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From: Elizabeth Meiklejohn <ElizabethM@virtusuper.com.au>
Sent: Thursday, 16 June 2022 11:28 AM
To: Chaitra Ramesh <ChaitraR@virtusuper.com.au>
Subject: FW: Tax

What did Alan say about transactions in b?



Elizabeth Meiklejohn SSA CA
Senior Associate

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From: Alan Lawton <lawtontate@gmail.com>
Sent: Friday, 10 June 2022 3:12 PM
To: Elizabeth Meiklejohn <ElizabethM@virtusuper.com.au>
Subject: Tax

Hello Elizabeth,

I am hoping to get a head start on compliance and tax matters this year. So when you can, could you let me know of any items that you need clarification on.

Thanks
Alan Lawton