

1454 Logan Road, Mount Gravatt Q 4122



07 3349 1452



PO BOX 83 Mount Gravatt Q 4122



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Elizabeth Meiklejohn

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**From:** Elizabeth Meiklejohn

**Sent:** Monday, 13 June 2022 12:17 PM

**To:** Alan Lawton <[lawtontate@gmail.com](mailto:lawtontate@gmail.com)>

**Cc:** Chaitra Ramesh <[ChaitraR@virtusuper.com.au](mailto: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
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 <b>paid personally</b>	2,090.00
8/02/2022	2021 tax liability <b>paid personally</b>	1,018.00

Ros super contribution

\$6,204

- 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](mailto:lawtontate@gmail.com)>  
**Sent:** Friday, 10 June 2022 3:12 PM  
**To:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto: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