



Stephen Cooke <stevecooke.c@gmail.com>

**Fwd: [Walshs] Tax Planning Meeting Follow Up**

4 messages

Heather finn <heather111finn@gmail.com>
To: Stephen Cooke <stevecooke.c@gmail.com>

Fri, Jun 11, 2021 at 11:13 AM

----- Forwarded message -----

From: **Stewart McLeod** <Stewart@walshs.com.au>

Date: Fri, Jun 11, 2021 at 10:51 AM

Subject: RE: [Walshs] Tax Planning Meeting Follow Up

To: Tarni Underhill <tarniu@walshs.com.au>, heather111finn@gmail.com <heather111finn@gmail.com>

Hi Heather,

Can you get this singed and returned to us?

Kind regards

Stewart McLeod**Principal**

BComm, BPhEd, CA, CTA, Cert IV FMBA, Dip Fin. Plan

Representative No: 1253498 Walshs Financial Planning Pty Ltd AFSL No. 432636

**Chartered Accountants | Financial Advisors**

Level 24, 10 Eagle Street, Brisbane QLD 4000 | GPO Box 12, Brisbane QLD 4001

T: 07 3221 5677 | F: 07 3221 5744 | W: www.walshs.com.au

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From: Tarni Underhill <tarniu@walshs.com.au>
Sent: Friday, 11 June 2021 9:11 AM
To: heather111finn@gmail.com
Cc: Stewart McLeod <Stewart@walshs.com.au>
Subject: Re: [Walshs] Tax Planning Meeting Follow Up

Morning Heather,

Please find attached Steve's 2019 signing pages.

Kind regards

Tarni Underhill

Client Services Coordinator

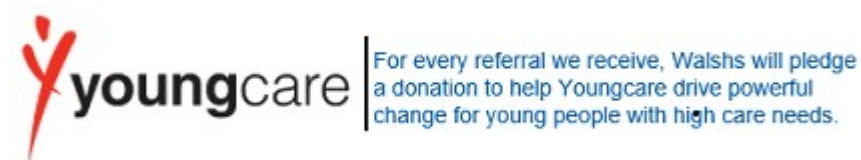
PA to Stewart McLeod



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From: Heather finn <heather111finn@gmail.com>
Sent: Monday, 24 May 2021 6:56 AM
To: Stewart McLeod <Stewart@walshs.com.au>
Subject: Re: [Walshs] Tax Planning Meeting Follow Up

Hi Stewart,

We've gotten most items actioned. Steve signs tax returns electronically in his portal

Kind regards

Heather

On Thu, May 20, 2021 at 4:01 PM Stewart McLeod <Stewart@walshs.com.au> wrote:

Hi Heather & Stephen,

It was great to have the chance to meet with you recently,

I've put together a summary of our meeting as a reminder of some items discussed for your reference. Your team will also be in contact with you over the weeks to come in regard to the action items listed below, however, if you have any questions in relation to any agenda items discussed please do not hesitate to contact me again.

2021-22 ATO Tax Payments

Please be aware that we are unable to finalise your 2020 tax return until we receive the source of the NSW Health Salary Supplement amount you are receiving. Once we have received this information we will also be able to provide your estimate for your 2021 tax return.

Stephen's wage

We discussed you continuing to paying Stephen a wage to maximise on your tax saving potential. The new net monthly amount to pay Stephen is \$1,497.50 from April 2021 onwards.

Financial Planning

The financial planning team will be in contact with you soon to arrange a time for you to meet with Simon to conduct your annual review.

Super Contributions

I will contact you in early June with amounts that we recommend you contribute to your super funds as additional contributions to maximise as a tax saving for the year.

We have also attached Third Party Authority forms for your super accounts. These allow us to contact the super fund and enquire on your behalf.

Logbook

I mentioned that it would be worthwhile completing a logbook so that you may have access to claiming all of your motor vehicle expenses (including fuel), under the assumption the travel is for work purposes or that you are required to take home expensive equipment that would not be safe it were to be left at work.

Please refer to the attachment for further information and requirements.

PMC Property Buyers

Following our discussion, I would like to introduce you to James Freudigmann who is the Director of PMC Property Buyers. James and his team have been assisting our clients with all their property needs for almost 7 years now and our clients have always provided great feedback and achieved very good results. I recommend viewing some of the case studies via their web site <https://www.pmcproperty.com.au/case-studies/> or googling "pmc property buyers Brisbane" and having a read of their google reviews.

Their team can uncover off-market opportunities and will assist in getting you into the market for your new home or investment. James's contact details are:

James Freudigmann

Co-Founder & Director

E: james@pmcproperty.com.au

M: 0435 807 759

www.pmcproperty.com.au

Audit Insurance

We will be sending out the renewal for the Audit Shield insurance in the coming months. Taking out this insurance in 2021-22 will protect yourself against the costly exercise should you be audited by the ATO, which can be randomly selected. It has also come to our attention that the ATO are allocating resources to review work-related expenses claimed by medical professionals.

Work Related Expenses

Please continue to pay all work/business related expenses from your business bank account and ensure any ABN income is deposited into this bank account. Attached is a detailed list of expenses you can put through your business account for your reference.

Change of PA

I would also like to take this opportunity to advise you that Tia O'Shea is no longer my PA. Moving forward,

Sophie Wataman will remain your Client Services Coordinator, and will assist you with all administrative work, commencement of your tax, and will be your first point of contact should you have any general queries.

Tarni Underhill is my PA, and will be able to assist you should you require any additional assistance or would like to book in a meeting with me.

Action items summary for you:

- We have attached a PDF copy of Stephen's 2019 & 2020 tax returns and signing pages. Can you please sign and return so we can lodge on your behalf.
- Please provide all documents for Trust income.
- Please pay Q4 super stream by 14/6/2021.
- Please update wage payments to Stephen.
- If you require any new office or work equipment, please ensure you purchase by 30/6/2021.
- Please find attached our third-party authority forms for access to your super funds, please sign and return.
- Please start a logbook
 - Please provide work related percentage use.
 - Provide invoice and finance documents.
- Please find attached Westpac view only access form, if you could please sign and return.
- Please organise Wills and EPOA

Fixed Fee

You will receive an email shortly from our billing software, Practice Ignition, with your fixed fee proposal for the 2021-22 year. Please review and accept this proposal at your earliest convenience. Please note, full payment for this fee will be deducted from your nominated payment method upon acceptance of your proposal. You will receive a full tax deduction this financial year (2020-21) for the proposal amount.

Important information regarding monthly payments for fixed fee proposals:

- If you accept the proposal any time **after** 1 July 2021, the monthly payments for all months since July will be deducted upon your acceptance, with the remaining monthly payments starting on the 1st of the next month.

If you have any queries in relation to the above, please do not hesitate to contact me at any time.

Kind regards

Stewart McLeod

Principal

BComm, BPhEd, CA, CTA, Cert IV FMBA, Dip Fin. Plan

Representative No: 1253498 Walshs Financial Planning Pty Ltd AFSL No. 432636



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Steve Cooke - 2019 Signing pages.pdf
137K

Heather finn <heather111finn@gmail.com>
To: Stephen Cooke <stevecooke.c@gmail.com>

Fri, Jun 11, 2021 at 11:17 AM

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Steve Cooke - 2019 Signing pages.pdf
137K

Stephen Cooke <stevecooke.c@gmail.com>
To: Stewart McLeod <Stewart@walshs.com.au>, tarniu@walshs.com.au
Cc: Heather Cooke <heather111finn@gmail.com>

Tue, Jun 22, 2021 at 7:04 AM

Hi Stewart, Tarni,

Please find the attached signed document.

Kind regards,

Stephen Cooke
[Quoted text hidden]

Steve Cooke - 2019 Signed.pdf
949K

Tarni Underhill <tarniu@walshs.com.au>
To: Stephen Cooke <stevecooke.c@gmail.com>, Stewart McLeod <Stewart@walshs.com.au>
Cc: Heather Cooke <heather111finn@gmail.com>

Tue, Jun 22, 2021 at 8:57 AM

Hi Stephen,

Thank you for returning these, we will lodge your returns as soon as possible.

Kind regards

Tarni Underhill

Client Services Coordinator

PA to Stewart McLeod



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youngcare

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From: Stephen Cooke <stevecooke.c@gmail.com>

Sent: Tuesday, 22 June 2021 1:04 PM

To: Stewart McLeod <Stewart@walshs.com.au>; Tarni Underhill <tarniu@walshs.com.au>

Cc: Heather Cooke <heather111finn@gmail.com>

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