

## RE: Steyn tax returns

**From:** Aleesha Steyn <aleeshasteyn@[REDACTED]>  
**To:** Shaun Helleur <shelleur@[REDACTED]>  
**Date:** Tue, 04 Feb 2020 00:09:32 +1100  
**Attachments:** BMT Tax Depreciation Report - 635215 Aleesha Steyn.PDF (1.72 MB); BMT Tax Receipt - 635215.pdf (190.49 kB); Fernlea cres bank loan offer.pdf (62.86 kB); Fernlea cres Contract of sale and purchase .pdf (3.71 MB); Fernlea cres deposit receipt.pdf (442.02 kB); Fernlea cres occupational cert.pdf (35 kB); Fernlea cres settlement adjustment sheet.pdf (76.68 kB); Fernlea cres title search.pdf (107.32 kB); Fernlea cres transfer .pdf (39.76 kB); Fernlea Loan statemetn feb19-30jun19.pdf (296.26 kB); Fernlea Rental income feb19-30jun19.pdf (324.74 kB); Fernlea Rental income feb19-30jun19.xlsx (14.52 kB); Fernlea Building insurance.pdf (353.51 kB)

Hi Shaun,

Please find attached info per your request.

NAB account has never been used and if it still exists, nothing has changed since that statement. I will attempt to close account.

Fernlea Cres is currently been rented privately by a family member (Peter Manuel) and there are no Agent fees, direct deposit of \$1000pf is made by Mr Peter Manuel – see statement & excel sheet attached.

Also attached, is Fernlea Cres building insurance.

Let me know if you require further information or clarity.

Kind Regards

**Aleesha**

[REDACTED] 9 786

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**From:** Shaun Helleur [mailto:shelleur@[REDACTED]]  
**Sent:** Thursday, 30 January 2020 12:06 PM  
**To:** aleeshasteyn@bigpond.com  
**Cc:** Michael Lord <mlord@pinnacletaxation.com.au>  
**Subject:** RE: Steyn tax returns

Hi Aleesha,

We are in the process of finalising your returns and just need a couple of items

- Bank statements for the SMSF's NAB Cash Maximiser covering the period 1/7/17 to 30/6/19 [last statement we have is attached for reference]
- The new loan for 758k, was this used to purchase an investment property? If so send through the following
  - Settlement statements showing purchase price, legal fees, stamp duty
  - Agent rental statements
  - BMT report

**PINNACLE**  
 taxation services

Shaun Helleur CPA, MTax – Senior Accountant  
 p: [REDACTED] 8 566  
 e: [shelleur@\[REDACTED\]](mailto:shelleur@[REDACTED])



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**From:** Michael Lord  
**Sent:** Friday, 10 January 2020 11:05 PM  
**To:** Shaun Helleur <[shelleur@\[REDACTED\]](mailto:shelleur@[REDACTED])>  
**Subject:** Fwd: Steyn tax returns

Can you please let Aleesha know if we need anything else

Sent from my iPhone

Begin forwarded message:

**From:** Aleesha Steyn <[aleeshasteyn@\[REDACTED\]](mailto:aleeshasteyn@[REDACTED])>  
**Date:** 6 January 2020 at 9:08:16 nm GMT-5  
**To:** Michael Lord <[mlord@\[REDACTED\]](mailto:mlord@[REDACTED])>  
**Subject:** Re: Steyn tax returns

Hi Michael

Complements of the season to all.  
Hope you had a good break.

Just checking the progress of our returns and if you need further information or clarification?

Let me know either way.

Kind Regards  
Aleesha  
[REDACTED] 9786

On 15 Nov 2019, at 06:42, Michael Lord <[mlord@\[REDACTED\]](mailto:mlord@[REDACTED])> wrote:

Thanks Aleesha

We will be in touch

Michael Lord - Director

p: [REDACTED] 566

e: [mlord@\[REDACTED\]](mailto:mlord@[REDACTED])

w: [REDACTED]

-----Original Message-----

From: Aleesha Steyn [[mailto:aleeshasteyn@\[REDACTED\]](mailto:aleeshasteyn@[REDACTED])]

Sent: Friday, 15 November 2019 12:03 AM

To: Michael Lord <[mlord@\[REDACTED\]](mailto:mlord@[REDACTED])>

Subject: Steyn attachments email3 - eom