

DEAYTON TAX CONSULTING

Your expert partners in resolving ATO tax issues

CASE STUDY GUIDANCE THROUGH THE TAX AND SUPER MAZE

SITUATION

Sometimes it is almost impossible to navigate the ATO “system”, procedures and people to obtain the correct outcome for a client. It is difficult for an accounting practice to understand all the possible issues; the time and trouble taken can mean that it is too hard.

ISSUES

An Accounting practices client had their superannuation account details incorrectly reported to the ATO. Transfer Balance Cap was exceeded which precluded additional contributions and an Excess Concessional Contribution Charge was raised.

STRATEGY

Using our understanding of how the management of superannuation occurs between the member, their superannuation fund and the ATO enabled us to deal with the right people in the right areas.

OUTCOME

Dealt with the ATO and engaged with the superannuation fund so that the ATO can in turn reverse the incorrect transactions.



MILES DEAYTON
Principal Director

MBA | B.Bus (Accounting) | Registered Tax Agent

“Working through the maze of red tape in these cases is time consuming (costly - and can it all be recovered?) It is also painful.”

E | info@deaytontaxconsulting.com.au

PH | 1300 661 387

W | www.deaytontaxconsulting.com.au



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A.B.N 16 814 602 814

