



SMSF AUDIT PROFILER

Complete and return this form to info@ddhstrategies.com.au or
Mail to 62 Bowley Street HENDRA QLD 4011

PROFILING YOUR SMSF CLIENTS

Profiling all of your SMSF clients will provide you with an ATO lodgement workflow tool. It will also assist us to manage volume and provide necessary staff to ensure that the service standards are met. In the table below please fill in the Fund name, Audit Year, Type of Fund and the Quarter that they are expected to arrive at the Auditors.

AUDIT DEADLINES

Our Auditors service standard for return of audits is four weeks, therefore to ensure lodgement deadlines are met, SMSF Audits need to be received by the following dates:
First Year Funds – 31st December (taking into account the holiday period)
Existing Funds and/or Multiple Years – 31st March

ESTIMATED ARRIVAL OF FUNDS TO AUDITOR (Attach separate sheet if insufficient space)

SMSF Names	Audit Year/s	1st Year Fund?	Q3 Jul-Sep	Q4 Oct-Dec	Q1 Jan-Mar	Q2 Apr-Jun
<i>Examples:</i> ABC Super Fund	14	Y	X			
Sample Super Fund	14	N		X		

CONTACT DETAILS

Name: Mr/Mrs/Ms

Company/Business (if applicable)

Dealer Group (if applicable)

Address

P: () Fx: () E:



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