

From: [Allan Gray Australia Client Services](#)
To: heatherbyrne@bigpond.com
Cc: [Ron Hannan](#)
Subject: RE: The Hannan Family Superannuation Fund
Date: Thursday, 9 March 2023 8:39:06 AM
Attachments: [ORB_ACC_100015403_INVESTOR_DistributionStatement_20211001150000.pdf](#)
[ORB_ACC_100015403_INVESTOR_DistributionStatement_20220104170500.pdf](#)
[ORB_ACC_100015403_INVESTOR_AnnualTaxStatement_20220713210800.pdf](#)
[ORB_ACC_100015403_INVESTOR_PeriodicStatement_20220808174300.pdf](#)
[ORB_ACC_100015403_INVESTOR_RedemptionLetterFull_20220119193100.pdf](#)

Dear Heather,

Thank you for your email.

Please find attached all statements relating to the FY 22 financial year for the account held in the name of M & R Hannan Pty Ltd <Hannan Family Superannuation Fund>, together with a copy of the redemption statement for your records.

Should you require any further assistance please do not hesitate to contact us.

Regards,

Gillian

From: heatherbyrne@bigpond.com <heatherbyrne@bigpond.com>
Sent: Wednesday, 8 March 2023 6:04 PM
To: Allan Gray Australia Client Services <clientservices@allangray.com.au>
Cc: Ron Hannan <ronkoolewong@bigpond.com>
Subject: FW: The Hannan Family Superannuation Fund
Importance: High

<p>CAUTION: This email is from an external source. The original sender of this email is heatherbyrne@bigpond.com</p>

Hello

would you be able to please send me the Annual Tax Statement for 2022 for this (now closed) account

I've attached a copy of last years' correspondence for your assistance and copied Ron Hannan the Director and Member of the super fund

many thanks

HEATHER BYRNE

BEc FTMA FTAA FIPA Cdec

Accountant & Tax Agent

www.sunshinecoasttax.com.au

Mobile 0439 582 717

41 Shady Grove
Tanawha QLD 4556

PO Box 921
Buderim QLD 4556

From: Allan Gray Australia Client Services <clientservices@allangray.com.au>
Sent: Tuesday, 23 March 2021 5:46 PM
To: heatherbyrne@bigpond.com
Subject: RE: The Hannan Family Superannuation Fund

Hi Heather

Please see attached letter we received that states you are the appointed financial adviser, so apologies for misunderstanding.
We will amend our records to add you to have authority on the account and please see attached FYE statements.

If there are any other statements you need, please let us know.

Kind regards
Fiona

From: heatherbyrne@bigpond.com <heatherbyrne@bigpond.com>
Sent: Tuesday, 23 March 2021 5:16 PM
To: Allan Gray Australia Client Services <clientservices@allangray.com.au>
Subject: RE: The Hannan Family Superannuation Fund
Importance: High

Hello Thankyou for this

Ron is exasperated because he wants me to receive access to the reports.
I am not a financial advisor – I am accountant and tax agent.

I need to have access to his distributions and reports

Can you please update your authority forms and send correct ones.

Then, I will complete

Regards

HEATHER BYRNE

BEC FTMA FTAA FIPA

Accountant & Tax Agent

www.sunshinecoasttax.com.au

Mobile 0439 582 717

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Tanawha QLD 4556

PO Box 921
Buderim QLD 4556

From: Allan Gray Australia Client Services <clientservices@allangray.com.au>

Sent: Tuesday, 23 March 2021 2:42 PM

To: heatherbyrne@bigpond.com

Subject: The Hannan Family Superannuation Fund

Hi Heather

We received a letter in the post today from Ronald and Margaret Hannan, asking us to update their contact details. They also stated in the letter that you are their financial adviser and accountant.

Should you wish to register with Allan Gray as an Adviser and we will link their account to your Allan Gray Australia adviser code, please will you kindly complete the attached adviser and dealer group registration forms. Please return by email to instructions@registry.allangray.com.au

Once forms have been received, we will complete your registration, provide you with an Adviser code and you will be connected to their Allan Gray Australia account. If you wish to take a fee from the investment account, please ensure the client signs the attached appointment form.

Kind regards
Fiona



Client Services

T 1300 604 604 | +61 2 8224 8604

E clientservices@allangray.com.au

Level 2, Challis House, 4 Martin Place
Sydney, NSW 2000, Australia
allangray.com.au

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