

From: [Charles Poolman](#)
To: [JenniferGibbon](#)
Subject: RE: Annalise Queries
Date: Tuesday, 7 March 2023 4:21:47 PM
Attachments: [22FY Insurance Summary - SMSF.pdf](#)

Hi Jenny,

1. Copy of Life Insurance policy showing amount paid etc **ATTACHED**
2. Copy of new \$200,000 loan agreement with Mayfair Property Ltd – **WILL GET FROM PG**
3. Advise as to what type of contributions they are on the attached spreadsheet? All employer concessional or something else? **SAME AS LAST YEAR**

Regards,

Charles

Charles Poolman

Principal - Sydney Margaret Street | Stockbroker Investment Adviser | Authorised Representative: 000299983

Level 24, Metcentre, 60 Margaret Street Sydney NSW 2000

GPO Box 5385 Sydney NSW 2001

Email: charles.poolman@morgans.com.au

Direct: 02 8215 5017 | Mobile: 0434 588 855 | Fax: 02 9258 8017 | morgans.com.au/MargaretStreet

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Morgans Financial Limited | ABN 49 010 669 726 | AFSL 235410

Any advice in this email is GENERAL in nature and no consideration has been given to your personal needs, objectives or circumstances. You should consider if this advice is appropriate for you.

From: JenniferGibbon <jgibbon@bigpond.net.au>
Sent: Friday, 3 March 2023 8:40 PM
To: Charles Poolman <charles.poolman@morgans.com.au>
Subject: Annalise Queries

Hi

For Annalise super can you please provide the following?

1. Copy of Life Insurance policy showing amount paid etc
2. Copy of new \$200,000 loan agreement with Mayfair Property Ltd
3. Advise as to what type of contributions they are on the attached spreadsheet? All employer concessional or something else?

Thank you

Kind Regards

Jenny

Jennifer Gibbon

Chartered Accountant

Phone: (02) 9987 1958

Mobile: 0419 414 295

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