From: Lauren Mears
To: Jillian Dwyer
Subject: FW: Policies: #3065065, E3065023, E3058436,E3058431
Date: Tuesday, 4 August 2020 12:26:08 PM
Attachments: image002.png

Hi JD

I only have the below email confirming the cancellation and refund. I hope that helps. We weren't the advisers.

In regards to the contributions our SOA says concessional conts. I would confirm with Dk.

We wouldn't get the statement sent to us from Vanguard. They should have received it. I got mine last week or so.

Kind Regards
Lauren Mears
Paraplanner

Request a call-back - please visit www.visionaryadvisors.com.au and click the **contact page** to make a call-back or a "zoom" appointment. It will allow easier and safer access to your accountant.
Our team is **working remotely** from their homes as the health and well-being of our people, our clients and our community is our priority. We want to reassure you that we are fully resourced to advise you through these difficult times.

VISIONARY WEALTH

Phone (02) 4926 7100
Fax (02) 4926 7144
Email laurenm@visionarywealth.com.au
Office Level 4, 16A Bolton St. Newcastle NSW 2300
Postal PO Box 1798 Newcastle NSW 2300
Online visionaryadvisors.com.au

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From: Life CustomerService <life_customerservice@asteronlife.com.au>
Sent: Friday, 8 November 2019 7:35 PM
To: Lauren Mears <laurenm@visionarywealth.com.au>
Subject: RE: Policies: #3065065, E3065023, E3058436,E3058431

Dear Lauren,

Policy Number: E3065065, E3065023, E3058436 & E3058431

Life Insured: Catherine Finlayson & Catherine Finlayson

Cancellation of insurance - thanks for letting us know.

Just as you've asked, we have cancelled the above client's policies.

The amount $541.58 & $1106.94 representing unused premiums have been refunded to your client's account ending in XXXX473 for the policies E3058436 & E3058431 respectively.

Confirmation have been sent via post.

We'd love to hear from you
At Asteron Life, we are always looking to improve our level of products and services we offer to ensure we meet you and
your client's needs.
We hope that you can assist us by completing a short survey
We're here to help
If you have any questions, please call us on the number below between 8am and 6pm AEST Monday to Friday. We'll be happy to help you.

Kind regards

Asteron Life Customer Service
Administration Team

Email: life_customerservice@asteronlife.com.au
Phone: 1800 221 727

Asteron Life

Celebrate Life

From: Lauren Mears <laurenm@visionarywealth.com.au>
Sent: Tuesday, 5 November 2019 12:41 PM
To: Life CustomerService <life_customerservice@asteronlife.com.au>
Subject: Policies: #3065065, E3065023, E3058436,E3058431

Hi Guys

Our clients wish to cancel their policies, please find attached letters.

Regards
Lauren Mears
Paraplanner

VISIONARY WEALTH

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