



Visionary Wealth Pty Ltd
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07 June 2022

Mr D & Mrs KLewis
24 Ocean View Pde
Charlestown NSW 2290

Dear Darren & Kim,

Your fixed term arrangement with us

As part of our ongoing fee and service agreement we have with you, dated 25/10/2021 to 24/10/2022, we are obligated to regularly review the arrangements we put in place or manage to ensure they remain appropriate and in your best interest.

In terminating your ongoing agreement, it is important you are aware that we will not provide any further ongoing advice services which were included in your agreement such as conducting regular reviews of our advice and your financial and personal situation. We will also not monitor your investments, personal insurances or send updates or alerts that may be applicable to you.

Please note, you will need to respond to any communication you receive from financial institutions and financial product providers requesting a response, as we will be unaware of your financial position and unable to action these requests on your behalf.

Please be assured that if you do require any further advice, you can re-engage our services on an ad hoc basis. We will provide a quote for any related work before commencing or alternatively you can request to re-establish a new ongoing agreement.

If you have any queries about this matter, or should you wish to re-engage with us in the future, please do not hesitate to contact us on 02 4926 7100 or denek@visionarywealth.com.au.

Yours sincerely,

Dene Kilpatrick
Authorised Capstone Representative No: 1240949