

Sue Lawson

From: Les Wigginton <lesw@regionalfp.com.au>
Sent: Tuesday, 8 October 2019 4:08 PM
To: leon@weberproperty.com.au; Myles Kehoe
Cc: Sue Lawson; Catherine Krezalek; Tamara Romyn
Subject: RE: Leon's life insurance
Attachments: Policy Document_110287790-Super Leon Weber.pdf; Policy Document_110291094-Super Catherine Krazalek-Weber.pdf

Hi Leon,

You currently have two policies that were organised by Myles over your Life. Catherine has a similar arrangement. There are policy schedules attached, however I am asking Neos Life to provide a document more suitable for Accounting purposes as I believe what they have supplied will not meet requirement as outlined by Sue. They should read Krezweb Super Pty Ltd as Trustee for Krezweb Super Fund.

Kind Regards

Les Wigginton | Financial Adviser / Director
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From: Leon Weber | Weber Property [mailto:leon@weberproperty.com.au]
Sent: Tuesday, 8 October 2019 3:03 PM
To: Myles Kehoe <mylesk@regionalfp.com.au>
Cc: Sue Lawson <sue@cleave.com.au>; Catherine Krezalek <cat_krez@hotmail.com>
Subject: Fwd: Leon's life insurance

Hi Myles

Hope you are well.

Can you please respond to Sue's query below?

Your NEOS Protection Plan Schedule

This schedule forms part of the NEOS Benefit Fund Rules. It shows the important details of your plan as at the plan commencement date shown below.

Your plan details

Plan number	110287790
Plan commencement date	02/05/19
State register	QLD

Your payment details

Premium frequency	Yearly
Yearly premium	\$1,365.03
Payment method	Direct debit
Account number	838165204
Premium due date	02/05/19
Your premium will be deducted yearly.	

Insured person details

Name	Leon Weber
Date of birth	11/04/84
Gender	Male



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NEOS Life (NEOS) is a registered business name of Australian Life Development Pty. Ltd. ABN 96 617 129 914 AFSL 502758. NEOS Protection is issued by NobleOak Life Limited (NobleOak) ABN 65 087 648 708 AFSL 247302. The NEOS Super Plan is issued by Tidswell Financial Services Ltd. (Tidswell) ABN 55 010 810 607 AFSL 237629 as Trustee of the max Superannuation Fund ABN 22 508 720 840, of which the NEOS Super Plan is a division. NEOS provides administration services in relation to NEOS Protection and the NEOS Super Plan on behalf of NobleOak and Tidswell.

Your cover details

Cover	Life Cover
Ownership	Super
Sum insured	\$1,750,000
Yearly premium	\$657.86
Premium type	Stepped
Optional benefits	Indexation Benefit
Commencement date	02/05/19
Expiry date	01/05/83
Occupation class	D
Special conditions, loadings and exclusions	None
Premium category	Preferred

Cover	Attached TPD Cover
Ownership	Super
Sum insured	\$1,750,000
Yearly premium	\$707.17
Premium type	Stepped
TPD definition	Super
Optional benefits	Indexation Benefit
Commencement date	02/05/19
Expiry date	01/05/83
Occupation class	LBC
Special conditions, loadings and exclusions	None
Premium category	Preferred