

Authority to proceed

Upon receiving the advice dated 10 May 2023 and reading the strategy and recommendations contained within, we confirm and acknowledge that:

- We have received and retained a copy of the Financial Services Guide and Adviser Profile.
- The details of our personal circumstances, financial position and lifestyle and financial objectives are accurately summarised within the SOA.
- If the information relating to our relevant circumstances contained in the SOA is, or becomes, incomplete or inaccurate, then the advice contained in the SOA may not be appropriate for us and that before acting on the advice, we need to consider the appropriateness of the advice, taking into account our objectives, financial situation and needs.
- The basis of the advice is clear and understood.
- Where we did not understand the recommendations made, we have sought and received clarification.
- We have been made fully aware of the need to fully disclose to the insurer/s all information relevant to our past lifestyle and health aspects.
- We will notify the insurer and our representative of any changes to our lifestyle and health up until the policy document/s are issued.
- We understand that if we do not disclose the requested information, the insurer/s may decline payment of any claim under the duty of disclosure requirements.
- We have been provided with and understand the information about remuneration and other benefits paid or payable as a result of obtaining the advice set out in the SOA or implementing the recommendations made in the SOA.
- We have received and retained the research pages provided and the applicable Product Disclosure Statements or other disclosure requirements.
- We understand that the contents of the advice are for our sole use.
- We authorise Shaw and Partners Limited to collect our advice fees and pay these as outlined in the disclosure section of this SOA.
- The advice was prepared by Andrew Faber, acting on behalf of Shaw and Partners Financial Planning Pty Limited, an Australian Financial Service Licence (No. 490255). We acknowledge that Shaw and Partners Limited is only licensed to provide financial services in Australia and the services provided are governed exclusively by the laws of Australia.
- The strategy and recommendations made in the SOA rely on the continuation of current legislation and the recommendations may become inappropriate if laws change.
- Our personal information will be dealt with in accordance with Shaw and Partners Limited Privacy Policy. If we have requested, we have been provided with a copy. We consent to our information being dealt with in that way, and for Shaw and Partners Limited to pass our information to third parties engaged by Shaw and Partners Limited to prepare financial reports for us.

Authorisation and Consent to Benefits

- I authorise Shaw and Partners Limited to collect my advice fees and pay these as outlined in the disclosure section of this SOA.

Accordingly, we have decided (by ticking the box below) to:

- Proceed in full with the implementation of the strategy and recommendations and authorise Shaw and Partners to implement them as per the SOA.
- Proceed with implementation of the strategy and recommendations with the following variations and authorise Shaw and Partners to implement them accordingly.



We acknowledge that, if the variations listed above are not discussed and agreed upon with our adviser, they cannot confirm that implementation of the recommendations (as we have varied them) are appropriate in light of our objectives, financial situation or needs without further analysis and advice, and neither our adviser, nor Shaw and Partners Limited are responsible for the consequences of implementing the varied recommendations, if we do not seek further advice.

Do not proceed

Martin Gurr ADF MSEM Super P/L

Client name

Signature

15/05/2023

Date

Susan Gurr ADF MSEM Super P/L

Client name

Signature

15/05/2023

Date

Andrew Faber

Adviser name

Signature

/ /

Date