

Authority to proceed

I/We, Mrs Emily Edwards, Mr Matthew Edwards, Mr Toby Spencer, Mrs Anika Spencer as trustee(s) for TEAM BRIS Super Fund, having read the Statement of Advice (SOA) dated 16-Dec-2021 and prepared by Elizabeth Meiklejohn acknowledge:

- The information provided in this document is accurate and reflects my/our current circumstances;
- That the recommendations given in this Statement of Advice meet our needs and objectives as stated in this document;
- That the recommendations given are based on legislation current at the time of making these recommendations;
- That because legislation is subject to change, these recommendations should be reviewed if not implemented within 90 days from the date on the cover of this SOA;
- I/We understand that the recommendations made in this Statement of Advice are for our use only and should not be passed on as recommendations suitable to other parties;
- That the recommendations made in this Statement of Advice, unless implemented in full as described, may not meet the desired outcomes stated as the goals and objectives described; and
- That where a referral has been given to another party to seek recommendation for investment and personal insurances, any recommendation made by that party is not the recommendation of Elizabeth Meiklejohn.

☐ I/We have sought advice, organised insurance and wish to proceed.

☐ I/We have sought insurance advice, declined it and wish to proceed.

☐ I/We are declining to seek personal insurance advice and wish to proceed.

☒ I/We want to proceed with partial rollover and will seek insurance advice.

☐ I/We have received insurance advice and do not wish to proceed until the insurance advice is implemented.

The recommendation in this SOA is to:

SMSF Establishment

- Establishment of a Self Managed Superannuation Fund
- The trustee is to be a CORPORATE TRUSTEE

Member	Total Balance	Taxable Component	Tax-Free Component
Mrs Emily Edwards	\$261,270.73	\$261,270.73	\$0.00

Mr Matthew Edwards	\$206,767.50	\$206,767.50	\$0.00
Mr Toby Spencer	\$283,833.98	\$283,833.98	\$0.00
Mrs Anika Spencer	\$110,936.08	\$110,707.25	\$228.83
Total	\$862,808.29	\$862,579.46	\$228.83

LRBA

- Establish a Limited Recourse Borrowing Arrangement as part of your SMSF structure

☒

I/We agree with the recommendation and give authority to proceed with implementation.

☐

I/We do not agree with the recommendation and do not wish to proceed with implementation.

☐

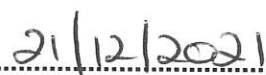
I/We want to proceed as above but with the following variation/s.

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I/We have received and read the Financial Services Guide version 4.2 / v.PAR892 - 2.1 provided to me/us on 13-Dec-2021



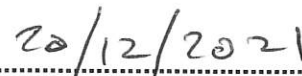
.....
Mrs Emily Edwards



.....
Date



.....
Mr Matthew Edwards



.....
Date

.....
Elizabeth Meiklejohn

.....
Date

CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME:

*I/We, the undersigned, hereby consent to act as *Director (or equivalent)/*Secretary/*Member of the above-mentioned Company.

Signature:



Full Name:

Street Address:

Date:

*Strike out if not applicable

CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME:

*I/We, the undersigned, hereby consent to act as *Director (or equivalent)/*Secretary/*Member of the above-mentioned Company.

Signature:



Full Name:

Street Address:

Date:

*Strike out if not applicable

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Signature:



Full Name:

Street Address:

Date:

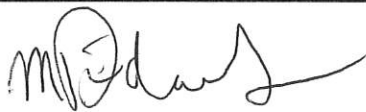
*Strike out if not applicable

CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME: SWEGMATE Pty Ltd

*I/We, the undersigned, hereby consent to act as *Director (or equivalent)/*Secretary/*Member of the above-mentioned Company.

Signature:



Full Name: Matthew David Edwards

Street Address: 85 Bundah Street

CAMP HILL QLD 4152

Date: 20/12/2021

*Strike out if not applicable