From: Vicki O"Connor
To: Stewart Freeth; Jillian Dwyer
Subject: FW: Stewart and Merren Freeth
Date: Friday, 7 February 2020 7:52:56 AM
Attachments: image003.png
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Findex-linkedin-icon_37c6143c-547a-4bb0-9f5b-8202b10970db.png

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FYI

Kind Regards

Vicki O'Connor BFinAdmin, DFP, CA, CFP®
Financial Advisor
P: 02 6800 2780 **M:** 0438 826262 **F:** 02 5818 5114
E: Vicki@hell-yes.com.au

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Authorised Representative of Viridian Select Pty Ltd
ABN 41 621 447 345 AFSL 515762

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From: Vicki Tucker <Vicki.Tucker@findex.com.au>
Sent: Thursday, 6 February 2020 2:29 PM
To: Vicki O'Connor <Vicki@hell-yes.com.au>

Subject: RE: Stewart and Merren Freeth

Hi Vicki

This was for an insurance premium rebate. Stewart cancelled his life insurance that was owned by the SMSF.

Cheers….Vicki

Kind regards,

Vicki Tucker Adv. Dipl. of Financial Planning
Adviser - Financial Planning
Main: 02 6883 5600

2 Commercial Avenue, Dubbo NSW 2830
findex.com.au

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From: Vicki O'Connor <Vicki@hell-yes.com.au>
Sent: Tuesday, 4 February 2020 12:19 PM
To: Vicki Tucker <Vicki.Tucker@findex.com.au>
Cc: Jillian Dwyer <JillianD@visionaryadvisors.com.au>
Subject: Stewart and Merren Freeth

Hi Vicki

Hope all is well at your end. Things going well here

The accountants for the SMSF are chasing deposit details for $7,186.00 deposited on 6 July 2018.

As this account was under the Crowe Horwath/Findex advice at the time – I have assumed you would have some details around this
Stewart mentioned that you cannot tell him this as you do not have access to the account -so I attached the cash account for the period that covers this date and amount

Could you please check your records as to what this deposit might be?
I have already checked it was not the 2018 ($7,628.64) or 2017 Tax Refunds ($8,886.79).

Kind Regards

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