

## Authority to proceed

I/We, Mr Andrew Kerr, Mrs Stacey Kerr as trustee(s) for Kerr Superannuation Fund, having read the Statement of Advice (SOA) dated 17-Oct-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
Mr Andrew Kerr	\$125,977.00	\$125,977.00	\$0.00

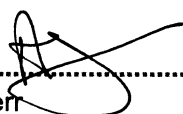
Mrs Stacey Kerr	\$91,626.63	\$91,626.63	\$0.00
<b>Total</b>	<b>\$217,603.63</b>	<b>\$217,603.63</b>	<b>\$0.00</b>

## 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 11-Oct-2021

.....  
Mr Andrew Kerr  19/10/21  
Date

.....  
Mrs Stacey Kerr  19/10/21  
Date

.....  
Elizabeth Meiklejohn  
Date

## CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME: Turtles Super Property Pty Ltd

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

Signature:

*SKW*

Full Name: Stacey Ann Kerr

Street Address: 59 Cranfield Drive

BUDERIM QLD 4556

Date: 19/10/21

\*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:

*Skew*

Full Name:

Street Address:

Date:


\*Strike out if not applicable

## CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME: Turtles Super Fund Pty Ltd

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

Signature:



Full Name: Andrew James Kerr

Street Address: 59 Cranfield Drive

BUDERIM QLD 4556

Date: 19/10/21

\*Strike out if not applicable

## CONSENT TO ACT AS AN OFFICER AND/OR MEMBER

PROPOSED COMPANY NAME: Turtles Super Property Pty Ltd

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

Signature:



Full Name: Andrew James Kerr

Street Address: 59 Cranfield Drive

BUDERIM QLD 4556

Date: 19/10/21

\*Strike out if not applicable