



BT Protection Plans

Annual Premium Summary

Policy Owner: MACGREGOR FAMILY SUPER FUND

Your policy details

Portfolio number: BL405325-A
Policy number: YL405328
Product name: Term Life
Policy risk commencement date: 30 April 2015
Premium frequency: Monthly

Summary period: 01/07/2020 to 30/06/2021

Total premium paid in this period: \$2,865.98

Your benefits at 30/06/2021

Insured Person: Sean Macgregor
Death Benefit: \$1,100,000
TPD Benefit (Any): \$1,092,727

Date of Birth: 04/05/1973

The insurance premium shown on your Annual Premium Summary may include stamp duty and policy fee. Please refer to your renewal document for the premium details.

The details provided in this Summary are for the financial year ending 30 June 2021. Any transactions completed with an effective date after 30 June 2021 will be included in next year's Summary.

The Insurer of BT Protection Plans is Westpac Life Insurance Services Limited ABN 31 003 149 157, AFSL Number 233728 ('the Insurer'). BT Protection Plans is issued by the Insurer except for Term Life as Superannuation and Income Protection as Superannuation which are issued by BT Funds Management Limited ABN 63 002 916 458 ('BTFM') as trustee of the Retirement Wrap ABN 39 827 542 991. The Insurer and BTFM are wholly owned subsidiaries of Westpac Banking Corporation ABN 33 007 457 141 ('the Bank'). Neither the Bank, nor any other member of the Westpac Group (other than the Insurer) guarantees the benefits payable under BT Protection Plans. This information is general in nature and does not take into account any person's personal circumstances. For terms and conditions relating to BT Protection Plans, including limits and exclusions, please refer to the appropriate Product Disclosure Statement available at bt.com.au.
Telephone: 1300 553 764 Fax: (02) 9274 5442 Mail: GPO BOX 5467, Sydney NSW 2001

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Mr Sean Macgregor

Date of Birth: 04 May 1973
Suburb: Ascot, 4007
Mobile: 0459847204
Smoker: See Policy Details

Term Life Policy

Benefits Cover & Options

Death

Benefit Cover

Benefit: \$1,100,000
Premium Type: Stepped

Options

Business Cover: No

TPD Rider

Benefit Cover

Benefit: \$1,092,727
Premium Type: Stepped
TPD Definition: Any Occupation
Occupation Class: A

Options

Double TPD: No
Disability Buy Back: No
Waiver of Life Premium: No
Business Cover: No

Financial Details

Premium Details

Annual Premium: \$2,754.84
Premium Frequency: Monthly
Premium Instalment: \$229.57
Payment Method: Direct Debit
Date Paid To: 30 Mar 2022

Commission/Fee Details

Revenue Type: Commission
Ongoing Commission/Fee Payable: Yes
Agent Dial Down: 0%
Commission Structure: Level
Split/Shared Commission: No
Ongoing Commission Fee: \$69.95 (33.00%) Monthly
Commission Percentage: 33.00%

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General Details

Portfolio Number: BL405325A

Lives Insured: Sean Macgregor

Smoker Status: Non Smoker

Lodgement Date: 20 Mar 2015

Risk Start Date: 30 Apr 2015

Renewal Date: 30 April

Product Name: BTPP

Adviser: F0680026

Policy Number: YL405328

Policy Status: In Force

Policy Owner: Macgregor Family Super Fund

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