

From: [Securitas Financial Group - Kevin](#)
To: [Troy Tatam](#)
Subject: RE: Troy's Insurance Anniversary June 2021
Date: Wednesday, 7 July 2021 2:07:59 PM
Attachments: [image001.png](#)
[image002.png](#)
[image003.png](#)

Hi Troy,

Short answer is No.....

The EOFY tax statement generally start becoming available in late July.

Is there anything in particular I can help with?

Below is a summary of personal cover you have:

Bryony Tatam	Benefit	Premium
Life	\$1,215,506.00	\$617.88
Trauma	\$303,876.00	\$853.56
TPD	\$1,215,506.30	\$947.23
Total		\$2,418.67

Troy Tatam	Benefit	Premium
Life	\$2,205,000.00	\$1,508.89
Trauma	\$593,282.60	\$1,548.76
TPD	\$2,431,012.50	\$2,118.60
Income Protection	\$9,163.00	\$2,778.48
Total		\$7,954.73

Below is a summary of business cover you have:

Troy Tatam	Benefit	Premium
Life	\$630,000.00	\$945.48
TPD	\$630,000.00	\$0
Total		\$945.48

Paul Tierney	Benefit	Premium
Life	\$630,000.00	\$886.20
TPD	\$630,000.00	\$1,289.76
Total		\$2,175.96

Kevin Bradshaw

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SECURITAS
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t: 08 9446 7732

e: kevin @ securitasfg.com.au

a: 1/134 Main St, Osborne Park, WA
6017

From: Troy Tatam <troy@advancedwa.com.au>

Sent: Wednesday, 7 July 2021 9:53 AM

To: Securitas Financial Group - Kevin <kevin@securitasfg.com.au>

Subject: RE: Troy's Insurance Anniversary June 2021

Hi Kevin,

Hope you are well?

With regards to EOFY annual statements for TAL and AIA rather than ask you or wait for documentation to arrive in post is there a client login I can access documents when I want showing premiums paid, cover value etc?

Thanks
Troy

From: Securitas Financial Group - Kevin <kevin@securitasfg.com.au>

Sent: Monday, 24 May 2021 4:48 PM

To: Troy Tatam <troy@advancedwa.com.au>

Subject: RE: Troy's Insurance Anniversary June 2021

Hi Troy,

Yes

Kevin Bradshaw

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From: Troy Tatam <troy@advancedwa.com.au>

Sent: Monday, 24 May 2021 4:45 PM

To: Securitas Financial Group - Kevin <kevin@securitasfg.com.au>

Subject: RE: Troy's Insurance Anniversary June 2021

Hi Jason,

I am well thank you.

Will this rollover automatically?

Thanks
Troy

From: Securitas Financial Group - Kevin <kevin@securitasfg.com.au>

Sent: Monday, 24 May 2021 4:06 PM

To: Troy Tatam <troy@advancedwa.com.au>; Paul Tierney <paul@advancedwa.com.au>

Subject: Troy's Insurance Anniversary June 2021

Hi Troy and Paul

I trust everyone is well.

I am writing to you because the buy sell insurance policy for Troy is due for renewal on the 10 of June.

Below is a summary of your cover from the renewal date.

Insurance	Level of Cover	Premium	Comments / Benefits
Life	\$630,000	\$78.79 monthly	
TPD	\$630,000		own occupation

You should review your insurance to ensure it is line with your particular needs, objectives and financial circumstances

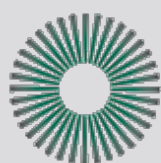
Please do not hesitate to contact me should you wish to discuss your insurance needs or other financial planning services

Regards

Kevin

Kevin Bradshaw

[securitasfg.com.au](mailto:kevin@securitasfg.com.au)



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