



21 July 2023

THE TRUSTEE(S)  
J & G WELSH SAF  
G  
81 HARSLETT CRES  
BEVERLEY PARK NSW 2217

## BT Protection Plans

### Annual Premium Summary

**Policy Owner:** J & G WELSH SUPERANNUATION FUND

#### Your policy details

<b>Portfolio number:</b>	B0970213-A
<b>Policy number:</b>	Y0970213
<b>Product name:</b>	Term Life
<b>Policy risk commencement date:</b>	18 October 2012
<b>Premium frequency:</b>	Yearly

**Summary period: 01/07/2022 to 30/06/2023**

**Total premium paid in this period: \$16,680.18**

**Your benefits at 30/06/2023**

Insured Person: Gregory Welsh  
Death Benefit: \$974,277  
TPD Benefit (Any): \$866,024

Date of Birth: 14/05/1962

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 2023. Any transactions completed with an effective date after 30 June 2023 will be included in next year's Summary.

The Insurer and Issuer is TAL Life Insurance Services Limited ABN 31 003 149 157 AFSL 233728 (TLISL), except for Term Life as Superannuation, Income Protection as Superannuation, and Income Protection Assured as Superannuation, which are issued by BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 (BTFM) as trustee of Asgard Independence Plan Division Two ABN 90 194 410 365. BTFM is a subsidiary of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714 (Westpac). Westpac does not guarantee the insurance. TLISL is part of the TAL Dai-ichi Life Australia Pty Limited ABN 97 150 070 483 group of companies (TAL). TAL companies are not part of the Westpac Group. BT is a trade mark of BT Financial Group Pty Limited ABN 38 087 480 331 and is used by TLISL under licence. Asgard is a trade mark of Asgard Wealth Solutions Ltd ABN 28 009 143 597 and is used by TLISL under licence. This information does not take into account your individual needs, objectives or financial situation. You should read the Product Disclosure Statement (PDS) before making a decision to purchase or continue to hold a product. A PDS can be obtained by visiting [bt.com.au](http://bt.com.au) or calling 1300 553 764. The information contained in this Annual Premium Summary should not be considered to be a comprehensive or complete statement of the cover provided and is only reflective of the state of affairs at the time it was issued. It should not be relied on by any person and he or she should make his or her own enquires. No representation, warranty or responsibility is made or accepted by the Insurer for any liability arising in any way, including but not limited to, negligence for errors or omissions. This disclaimer is subject to any requirements of the law and should be read accordingly.