

Portfolio report for Mr. Edward Cuderman

Edward Cuderman

19 Bourke St Mentone VIC 3194 Australia
as at April 2, 2019

Portfolio summary report

Insurance

Life, income protection and disability insurance

AMP Insurance

P811359304

AMP Insurance (P811359304)

Summary

Policy details	
Class of business	Ordinary
Commencement date	13 Dec 2017
Expiry date	21 Sep 2039
Status	A
TFN provided	No
Insured	Edward Miroslav Cuderman
Frequency loaded policy fee	\$5.73
Last update	13 Dec 2018
CPI status	Yes

Contact address	
Address	Edward & Karen Cuderman ATF Cu 19 Bourke St MENTONE VIC 3194 Australia

Interested parties	
Insured name	Edward Miroslav Cuderman
Insured date of birth	21 Sep 1964
Owner name	Edward & Karen Cuderman ATF Cuderman Family SF
Contact person	Edward & Karen Cuderman ATF Cuderman Family SF
Payer of premiums	Cuderman Family Super fund

Financial planner details	
Financial planner name	MR RODERIC MORGAN
Business telephone number	03 9867 5596

Payment details

Payment details	
Instalment premium	\$2,096.04
Payment frequency	Yearly
Payment method	Bank direct debit
Next premium due	13 Dec 2019
Premium cease date	21 Sep 2039

Insurance details

Life Insurance SMSF Plan for Edward Miroslav Cuderman	
Sum insured	\$357,000.00
Smoker status	Non-Smoker
Commencement date	13 Dec 2017
Expiry date	21 Sep 2039
Premium amount	\$2,027.28
Premium frequency	Yearly
CPI status	Yes
Premium structure	Stepped
Increasing claim option	No

Discount		
Discount type	Discount amount	Discount percentage
Large sum (percentage)		6.00%

Underwriting	
Exclusions (May/may not apply to entire benefit)	No exclusions
Loadings	Loadings exist

Direct debit details

Direct debit details	
Account name	CUDERMAN FAMILY SUPER FUND
BSB number	013483
Account number	306204057

Transaction details

Transaction details			
Effective date	Description	Option	Amount
14 Dec 2017	Regular premium	AMP Insurance	\$1,752.84

Important Notes and disclaimers

Except where it relates to products issued to you by a third party, information in this Portfolio Report is provided by AMP Life and is current as at 02/04/2019. However, recent transactions may not be included and should therefore only be used as a guide. It is provided by Roderic Deane Morgan. Where the Portfolio Report contains information about products issued to you by a third party, AMP takes no responsibility for that information and does not warrant that it is accurate, complete or up-to-date. This Portfolio Report is provided as factual information only and should not be considered a substitute for professional financial advice or a review of your current financial situation. This report should be viewed together with the Product Disclosure Documents which, for AMP products, can be found at amp.com.au. It does not take into account your particular investment objectives, financial situation or investment needs.