

# Policy Number



## 91040819

<b>Commencement date</b>	03/10/2019	<b>Product</b>	Zurich Wealth
<b>Status</b>	IN FORCE		Protection - Zurich
<b>Agent number</b>	P675		Protection Plus
<b>LIF Flag</b>	Yes	<b>Superannuation</b>	Yes
<b>LiveWell Policy</b>	Yes	<b>Series</b>	3
<b>Policy Anniversary Tier</b>			

## Client Role(s)

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<b>Client role</b>	<b>Name</b>	<b>DOB</b>
LIFE INSURED	Tin Tran	8/10/1977
POLICY OWNER, PAYOR	Tran Nguyen Self Managed Super Fund	

## Payor/Payment details

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<b>Payor name</b>	Tran Nguyen Self Managed Super Fund
<b>Payor address</b>	C/- The Trustees 9 Lindsay St, Vale Park, SA, 5081
<b>Billing frequency</b>	Yearly
<b>Total premium*</b>	1,858.92
<b>Paid to date</b>	10/10/2023
<b>Method of Payment</b>	Direct Debit
<b>Account name</b>	Tran Nguyen Smsf Pty Ltd
<b>Account number</b>	967425885
<b>BSB</b>	182512
<b>Institution</b>	MacQuarie Bank Limited

\* Total premiums are inclusive of any management fee or stamp duty where applicable.

## Policy & benefit details

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**Life insured**                      **Tin Tran**

## Zurich Protection Plus

<b>Date of birth</b>	08/10/1977
<b>Gender</b>	Male
<b>Smoker status</b>	Non Smoker
<b>Total premium* / frequency</b>	1,858.92 / Yearly
<b>BPAY reference number</b>	910408194
<b>Related non-superannuation policy</b>	Protection Plus policy number 91040820
<b>CPI option</b>	Yes
<b>Super type</b>	External Trustee

## Death & terminal illness

<b>Current sum insured</b>	\$526,389
<b>Current premium</b>	\$380.19
<b>Description</b>	Death Step
<b>Cover commencement date</b>	03/10/2019 (42 years)
<b>Responsibility period</b>	24 months
<b>Original sum insured</b>	\$450,000
<b>Current sum insured</b>	\$526,389
<b>Contribution type</b>	Employer
<b>Tax flag</b>	Yes
<b>Premium / Cover Term</b>	58 years, 00 months
<b>Premium / Cover Cessation</b>	03/10/2077 (100 years)
<b>Premium</b>	\$380.19
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No

## TPD insurance

<b>Current sum insured</b>	\$526,389
<b>Current premium</b>	\$309.15
<b>Description</b>	TPD Any Non-Linked Step
<b>Cover commencement date</b>	03/10/2019 (42 years)
<b>Responsibility period</b>	24 months
<b>Original sum insured</b>	\$450,000
<b>Current sum insured</b>	\$526,389
<b>Premium / Cover Term</b>	58 years, 00 months
<b>Premium / Cover Cessation</b>	03/10/2077 (100 years)
<b>Premium</b>	\$309.15
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No
<b>TPD Class</b>	A1

## Exclusions

Exclusion:

In the event of claim, in addition to the need to meet the definition of total and permanent disablement, your TPD insurance will be subject to a permanent incapacity restriction.

## Death & terminal illness

<b>Current sum insured</b>	\$350,926
<b>Current premium</b>	\$530.03
<b>Description</b>	Death Lvl
<b>Cover commencement date</b>	03/10/2019 (42 years)
<b>Responsibility period</b>	24 months
<b>Original sum insured</b>	\$300,000
<b>Current sum insured</b>	\$350,926
<b>Contribution type</b>	Employer
<b>Tax flag</b>	Yes
<b>Premium / Cover Term</b>	58 years, 00 months
<b>Premium / Cover Cessation</b>	03/10/2077 (100 years)
<b>Premium</b>	\$530.03
<b>Premium style</b>	Level
<b>Premium Waiver</b>	No

## TPD insurance

<b>Current sum insured</b>	\$350,926
<b>Current premium</b>	\$545.54
<b>Description</b>	TPD Any Non-Linked Lvl
<b>Cover commencement date</b>	03/10/2019 (42 years)
<b>Responsibility period</b>	24 months
<b>Original sum insured</b>	\$300,000
<b>Current sum insured</b>	\$350,926
<b>Premium / Cover Term</b>	58 years, 00 months
<b>Premium / Cover Cessation</b>	03/10/2077 (100 years)
<b>Premium</b>	\$545.54
<b>Premium style</b>	Level
<b>Premium Waiver</b>	No
<b>TPD Class</b>	A1

## Exclusions

Exclusion:

In the event of claim, in addition to the need to meet the definition of total and permanent disablement, your TPD insurance will be subject to a permanent incapacity restriction.

## Policy Stamp Duty

**Total amount** \$94.01

\* Total premiums are inclusive of any management fee or stamp duty where applicable.

## Accounting History (Last 12 months)

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Process date	Effective date	Transaction description	Amount paid
07/10/2022	10/10/2022	Premium Allocation	\$1858.92

Dates displayed are the effective date of the accounting transaction. Accounting transaction history may not show accounting transactions that are not yet processed at the date of enquiry.

## Policy correspondence (Last 12 months)

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Issue date	Agent number	Client name	Document type	Distribution method
30/08/2022	P675	Tran Nguyen Self Managed Super Fund	Life Risk Renewal Notices RC	Emailed
05/08/2022	P675	Tran Nguyen Self Managed Super Fund	Term Life Annual Statements TL	Emailed

Zurich's document archive provides a select list of statements, letters, notices and other documents in a PDF format that is best viewed with the latest version of Adobe Acrobat reader (<https://get.adobe.com/reader/>).

## Service Requests (Last 24 months)

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Ref.	Subject	Raised By	Status	Created	Closed
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## Beneficiary details

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We do not accept nomination of beneficiaries for this policy ownership type. Please contact the trustee of your fund for information about nominating beneficiaries.

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