

Policy Number



91040819

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

Client Role(s)

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

Payor/Payment details

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

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

Policy & benefit details

Life insured **Tin Tran**

Zurich Protection Plus

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

Death & terminal illness

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

TPD insurance

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

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

TPD insurance

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

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)

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

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Service Requests (Last 24 months)

Ref.	Subject	Raised By	Status	Created	Closed
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Beneficiary details

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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