

Policy Number

50155720



Commencement date	13/04/2017	Product	Zurich Active - Zurich
Status	IN FORCE		Active Cover
Agent number	P675	Superannuation	Yes
LIF Flag	No	Series	1
Reference No.	802369679		
LiveWell Policy	Yes		
Policy Anniversary Tier			

Client Role(s)

Client role	Name	DOB
POLICY OWNER, PAYOR	The Trustee Of The Moffatt Self Managed Super	
LIFE INSURED	Timothy Moffatt	4/07/1984

Payor/Payment details

Payor name	The Trustee Of The Moffatt Self Managed Super
Payor address	Po Box 230, Glen Osmond, SA, 5064
Billing frequency	Yearly
Total premium*	1,095.72
Paid to date	13/04/2023
Method of Payment	Direct Debit
Account name	Noula Smsf Pty Ltd ATF Moffatt
Account number	968585273
BSB	182512
Institution	MacQuarie Bank Limited

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

Policy & benefit details

Life insured**Timothy Moffatt****Zurich Active Cover**

Date of birth	04/07/1984
Gender	Male
Smoker status	Non Smoker
Total premium* / frequency	1,095.72 / Yearly
BPAY reference number	501557201
Related non-superannuation policy	Active Cover policy number 50155719
CPI option	No
Super type	External Trustee

Death & terminal illness

Current sum insured	\$600,000
Current premium	\$723.71
Description	Active Cover - Level
Cover commencement date	13/04/2017 (32 years)
Responsibility period	12 months
Original initial amount of cover	\$735,000
Current amount of cover	\$600,000
Remaining amount of cover	\$600,000
Contribution type	Employer
Tax flag	Yes
Premium / Cover Term	67 years, 00 months
Premium / Cover Cessation	13/04/2084 (99 years)
Premium	\$723.71
Premium style	Level
Health Events occupation class	1E
Extended care option	Yes
Occupational impairment	Own occupation

Benefit Categories

Benefit category	Type of cover	Maximum amount payable
AA	Death and terminal illness	600,000
A	Health events	600,000
B	Health events	0
C	Health events	0
D	Health events	0
E	Health events	0
Extended care amount		300,000
Protected amount		150,000

Exclusions

Exclusion:

An Exclusion exists on this policy. Please refer to the Policy Schedule for more information.

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Death & terminal illness

Current sum insured	\$600,000
Current premium	\$328.54
Description	Active Additional Death Lvl
Cover commencement date	13/04/2017 (32 years)
Responsibility period	12 months
Original sum insured	\$1,000,000
Current sum insured	\$600,000
Contribution type	Employer
Tax flag	Yes
Premium / Cover Term	67 years, 00 months
Premium / Cover Cessation	13/04/2084 (99 years)
Premium	\$328.54
Premium style	Level

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An Exclusion exists on this policy. Please refer to the Policy Schedule for more information.

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Policy Stamp Duty

Total amount \$43.47

* 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
12/04/2022	13/04/2022	Premium Allocation	\$1095.72

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
05/08/2022	P675	The Trustee Of The Moffatt Self Managed Super	Term Life Annual Statements TL	Printed
07/04/2022	P675	The Trustee Of The Moffatt Self Managed Super	Risk New Bus And Transact Pack RN	Printed
14/03/2022	P675	The Trustee Of The Moffatt Self Managed Super	Life Risk Renewal Notices RC	Printed
03/02/2022	P675	The Trustee Of The Moffatt Self Managed Super	Life Risk Renewal Notices RC	Printed

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)

Ref.	Subject	Raised By	Status	Created	Closed
SF1515737		Adviser	Closed	08/04/2022	20/04/2022
SF1493968		Adviser	Closed	30/03/2022	07/04/2022
	Direct Debit				
SF1430766	Request for policies 50155720	Adviser	Closed	21/02/2022	21/02/2022

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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