

# Policy Number



## 91102875

<b>Commencement date</b>	10/02/2021	<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)

Client role	Name	DOB
POLICY OWNER, PAYOR	The Trustee Of The Moffatt Self Managed Super	
LIFE INSURED	Melanie Moffatt	5/06/1986

## Payor/Payment details

<b>Payor name</b>	The Trustee Of The Moffatt Self Managed Super
<b>Payor address</b>	Po Box 230, Glen Osmond, SA, 5064
<b>Billing frequency</b>	Yearly
<b>Total premium*</b>	558.95
<b>Paid to date</b>	10/02/2023
<b>Method of Payment</b>	Direct Debit
<b>Account name</b>	Noula Smsf Pty Ltd ATF Moffatt
<b>Account number</b>	968585273
<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

**Life insured** **Melanie Moffatt**

## Zurich Protection Plus

<b>Date of birth</b>	05/06/1986
<b>Gender</b>	Female
<b>Smoker status</b>	Non Smoker
<b>Total premium* / frequency</b>	558.95 / Yearly
<b>BPAY reference number</b>	911028751
<b>CPI option</b>	Yes
<b>Super type</b>	External Trustee

## Death & terminal illness

<b>Current sum insured</b>	\$1,050,000
<b>Current premium</b>	\$218.38
<b>Description</b>	Death Step
<b>Cover commencement date</b>	10/02/2021 (34 years)
<b>Responsibility period</b>	12 months
<b>Original sum insured</b>	\$1,000,000
<b>Current sum insured</b>	\$1,050,000
<b>Contribution type</b>	Employer
<b>Tax flag</b>	Yes
<b>Premium / Cover Term</b>	65 years, 00 months
<b>Premium / Cover Cessation</b>	10/02/2086 (99 years)
<b>Premium</b>	\$218.38
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No

## Buy back death (TPD)

<b>Current sum insured</b>	\$1,050,000
<b>Current premium</b>	\$15.28
<b>Description</b>	Buy Back Death (Tpd) Step
<b>Cover commencement date</b>	10/02/2021 (34 years)
<b>Responsibility period</b>	12 months
<b>Original sum insured</b>	\$1,000,000
<b>Current sum insured</b>	\$1,050,000
<b>Premium / Cover Term</b>	32 years, 00 months
<b>Premium / Cover Cessation</b>	10/02/2053 (66 years)
<b>Premium</b>	\$15.28
<b>Premium style</b>	Stepped

## TPD insurance

<b>Current sum insured</b>	\$1,050,000
<b>Current premium</b>	\$202.66
<b>Description</b>	TPD Any Non-Linked Step

<b>Cover commencement date</b>	10/02/2021 (34 years)
<b>Responsibility period</b>	12 months
<b>Original sum insured</b>	\$1,000,000
<b>Current sum insured</b>	\$1,050,000
<b>Premium / Cover Term</b>	65 years, 00 months
<b>Premium / Cover Cessation</b>	10/02/2086 (99 years)
<b>Premium</b>	\$202.66
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No
<b>TPD Class</b>	A3

## 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

<b>Total amount</b>	\$23.97
---------------------	---------

\* 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
21/02/2022	19/02/2022	Premium Allocation	\$558.95
09/02/2022	10/02/2022	Premium Allocation	\$558.95
15/02/2022	10/02/2022	Direct Debit Dishonour	\$-558.95

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

15/02/2022	P675	The Trustee Of The Moffatt Self Managed Super	Life Risk Renewal Notices RC	Printed
11/01/2022	P675	The Trustee Of The Moffatt Self Managed Super	Life Risk Renewal Notices RC	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)

---

Ref.	Subject	Raised By	Status	Created	Closed
SF1430475	Direct Debit Request for policies 91102875	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.

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information.

While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.