

# Policy Number



## 91100767

<b>Commencement date</b>	22/01/2021	<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	Moffatt Self Managed Super Fund	
LIFE INSURED	Timothy Moffatt	4/07/1984

## Payor/Payment details

<b>Payor name</b>	Moffatt Self Managed Super Fund
<b>Payor address</b>	C/- The Trustees 1 Oakleigh Ave, Magill, SA, 5072
<b>Billing frequency</b>	Yearly
<b>Total premium*</b>	654.86
<b>Paid to date</b>	22/01/2023
<b>Method of Payment</b>	Direct Debit
<b>Account name</b>	Moffatt Self Managed Super Fund
<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

<b>Life insured</b>	<b>Timothy Moffatt</b>
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## Zurich Protection Plus

<b>Date of birth</b>	04/07/1984
<b>Gender</b>	Male
<b>Smoker status</b>	Non Smoker
<b>Total premium* / frequency</b>	654.86 / Yearly
<b>BPAY reference number</b>	911007672
<b>Related non-superannuation policy</b>	Protection Plus policy number 91100768
<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>	\$306.01
<b>Description</b>	Death Step
<b>Cover commencement date</b>	22/01/2021 (36 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>	63 years, 00 months
<b>Premium / Cover Cessation</b>	22/01/2084 (99 years)
<b>Premium</b>	\$306.01
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No

## TPD insurance

<b>Current sum insured</b>	\$1,050,000
<b>Current premium</b>	\$225.40
<b>Description</b>	TPD Any Non-Linked Step
<b>Cover commencement date</b>	22/01/2021 (36 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>	63 years, 00 months
<b>Premium / Cover Cessation</b>	22/01/2084 (99 years)
<b>Premium</b>	\$225.40
<b>Premium style</b>	Stepped
<b>Premium Waiver</b>	No
<b>TPD Class</b>	A1

## Exclusions

**Exclusion:**

No benefit will be payable for any mental or behavioural condition classified in the Diagnostic and Statistical Manual of Mental Disorders (DSM) or in any other clinically recognised diagnostic manual (including any replacement or successor to DSM).

No benefit will be payable for any condition that relies on medical symptoms alone without the support of abnormal test results from medical imaging, pathology or blood tests that explain the symptoms. For example, no benefit will be payable for chronic fatigue syndrome or fibromyalgia.

**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** \$24.79

\* 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
21/01/2022	22/01/2022	Premium Allocation	\$654.86

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
05/08/2022	P675	Moffatt Self Managed Super Fund	Term Life Annual Statements TL	Emailed
23/12/2021	P675	Moffatt Self Managed Super Fund	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)

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Ref.	Subject	Raised By	Status	Created	Closed
SF1360237	Direct Debit Request for policies 91100767	Adviser	Closed	30/12/2021	31/12/2021

## 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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