

# 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

**Total amount** \$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)

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Ref.	Subject	Raised By	Status	Created	Closed
SF1430475	Direct Debit Request for policies 91102875	Adviser	Closed	21/02/2022	21/02/2022

## 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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