

James Madison Insurance Summary

James Madison (Jim)

11407 Constitution Hwy
 Montpelier Station, VA 22957
 james@madison.com

- (212) 875-3907
- (212) 875-8734
- (212) 875-3908
- (212) 458-1234
- (212) 555-4567

Business Phone Direct Line
 Home Phone
 Business Fax Marketing
 Cell Phone
 Business Phone

Primary Insured Owner	Policy Company Effective	Benefit	Premium
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Disability Contract Coverages

Professional Series

James Madison	The ABC Insurance Company	\$1,300.00	\$2,070.00
James Madison	3/14/2008	Monthly Income	\$167.50 Monthly

Total For Disability		\$1,300.00	\$2,070.00
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Life Insurance Contract Coverages

ABC's Ultimate Universal Life

James Madison	The ABC Insurance Company	\$1,100,000.00	\$6,400.00
The James Madison Irrevocable Life Insurance Trust	4/2/2002		\$533.34 Monthly

ABC's Whole Life Series 100

James Madison	The ABC Insurance Company	\$1,250,000.00	\$2,300.32
Dolley Madison	6/1/1991		\$197.23 Monthly

Total For Life Insurance		\$2,350,000.00	\$8,700.32
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Long Term Care Contract Coverages

Platinum Plan

James Madison	The ABC Insurance Company	\$170.00	\$1,240.12
James Madison	3/14/2008	Daily Benefit	\$0.00 Monthly

XYZ Co. Elite Series LTC

James Madison	The XYZ Insurance Company	\$200.00	\$2,850.00
James Madison	7/7/2006		\$2,850.00 Annual

Total For Long Term Care		\$370.00	\$4,090.12
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P and C / Other Contract Coverages

ABC Safe Plus Auto Plan

James Madison	The XYZ Insurance Company	\$300,000.00	\$1,600.00
The Acme Company	6/3/2003		\$800.00 Semi-Annual

Homeowner's Plus Ultra

James Madison	The XYZ Insurance Company	\$300,000.00	\$350.00
James Madison	5/1/2003		\$175.00 Semi-Annual

Total For P and C / Other

\$600,000.00 **\$1,950.00**

Retirement Contract Coverages

ABC Company Variable Annuity

James Madison	The ABC Insurance Company	\$250,000.00	\$4,800.00
James Madison	1/5/2003		\$400.00 Monthly

The ABC Co. SPDA 1990 Series

James Madison	The ABC Insurance Company	\$17,500.00	\$600.00
James Madison	11/1/1999		\$50.00 Monthly Check

Total For Retirement

\$267,500.00 **\$5,400.00**

Total Annual Premium **\$22,210.44**