

Insurance Policy Summary

Sorted By Effective Date

James Madison (Policy Owner)

James Madison
 11407 Constitution Hwy
 Montpelier Station, VA 22957

For Service Contact:

Chris Moneymaker
 Owner
 Moneymaker Insurance & Investments
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 Anytown, CA 12345
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Plan Of Coverage Insured(s)	Policy #	Company	Effective / Status	Payment / Frequency	Benefit	Annual Premium	Cash Value
The ABC Co. SPDA 1990 Series James Madison	342957 Primary Insured	ABC Issued Age 48	11/1/1999 In Force 11/1/1999	\$50.00 Monthly Check	\$17,500	\$600.00	\$16,543.00
ABC Company Variable Annuity James Madison	27456 Primary Insured	ABC Issued Age 46	1/5/2003 In Force 1/5/1998	\$400.00 Monthly	\$250,000	\$4,800.00	\$228,862.95
Homeowner's Plus Ultra James Madison	884765764538 Primary Insured	XYZ Issued Age 0	5/1/2003 In Force 5/1/2003	\$175.00 Semi-Annual	\$300,000	\$350.00	\$0.00
XYZ Co. Elite Series LTC James Madison	6328675 Primary Insured	XYZ Issued Age 55	7/7/2006 In Force 7/7/2006	\$2,850.00 Annual	\$200	\$2,850.00	\$0.00
Professional Series James Madison	164598 Primary Insured	ABC	3/14/2008 Pending	\$167.50 Monthly	\$1,300	\$2,070.00	\$0.00
Platinum Plan James Madison Dolley Madison	164598 Primary Insured Additional Insured	ABC Issued Age 55 Issued Age 42	3/14/2008 Pending 8/1/2006 8/1/2006	\$0.00 Monthly	\$170	\$1,240.12	\$0.00
Totals						\$11,910.12	\$245,405.95