

Insurance New Business Pending

Sorted By Policy Company And Primary Insured

Primary Proposed Insured	Coverage Plan	Submitted Date	Benefit	Cov Total Ann Prem
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The ABC Insurance Company

Policy #APP-2 Samuel Q. Adams	ABC's Whole Life Series 100	3/24/2003	\$500,000.00	Pending \$4,100.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
Samuel Q. Adams	3/26/2003	APS request from Dr. Cutter		Mary at Cutter's is handling APS. Cost \$45.	CM
Samuel Q. Adams	3/28/2003	Chemical Profile		Appt. is 3/28 at 2pm.	CM

Policy #8475 Samuel Q. Adams	Professional Series	4/1/2003	\$4,000.00	Pending \$1,890.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
Samuel Q. Adams	4/11/2003	Financial Statement		Accountant is Henry James at 384-8764	CM

Policy #12345 Thomas H. Jefferson	The ABC's Premier Universal Life	3/17/2003	\$200,000.00	Pending \$21,006.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
Thomas H. Jefferson	3/25/2003	Blood Workup		Roving Medics Appt. 3/25 4pm.	CM
Thomas H. Jefferson	3/25/2003	Chemical Profile		Appt. 3/25 at 4pm.	CM

Policy #7645372 James Madison	ABC's Ultimate Universal Life	2/28/2002	\$1,100,000.00	In Force \$6,400.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
James Madison	4/8/2002	Vital Capacity Test		Roving Medics will run the test on Mon. at 3pm.	CM
James Madison	4/10/2002	Attending Physician's Stmt. - Dr.		Check with Nancy re: APS. Cost \$50.	CM

Policy #164598 James Madison	Professional Series	2/7/2008	\$1,300.00	Pending \$2,070.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
James Madison	2/10/2008	APS request from Dr. Cutter		Check on status of APS with Nancy. Cost \$50.	CM
James Madison	2/20/2008	Actuary			CM

Policy #36452 John Sample	ABC's Whole Life Series 100	4/10/2003	\$250,000.00	Pending \$2,873.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
John Sample	4/14/2003	Chemical Profile		Appt. is 4/14 11am.	CM
John Sample	4/14/2003	EKG Request		Appt. is 4/14 11am.	CM

The XYZ Insurance Company

Policy #2345 Thomas H. Jefferson	XYZ Elite 5 Year Renewable Term	3/4/2003	\$100,000.00	\$4,422.00
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Insured	Initiated	Action Requested	Completed	Notes	Last
Thomas H. Jefferson	3/6/2003	Application Sent To Home Office			CM
Thomas H. Jefferson	3/17/2003	Blood Workup		Roving Medics appt. at 5:00pm Monday.	CM

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Primary Proposed Insured	Coverage Plan	Submitted Date	Benefit	Cov Total Ann Prem
The XYZ Insurance Company				
Policy #2345456 James Monroe	Executive 25 Universal Life	3/6/2003	\$200,000.00	Pending \$1,200.00
Insured	Initiated	Action Requested	Completed	Notes
James Monroe	3/19/2003	APS - Dr. Cutter		APS's running a couple of weeks. Cost \$55. CM
Policy #763452 Henry Washington	ABC's Universal Life 89	9/10/1994	\$50,000.00	Active \$1,900.00
Insured	Initiated	Action Requested	Completed	Notes
Henry Washington	4/9/1995	Application sent to HO		CIC
Henry Washington	4/9/1995	APS request from Dr. Jones		CIC
Total Coverage Annual Premium This Report				\$45,861.00