

Producer Insurance New Business Summary

As of 6/18/2008

Chris Moneymaker
 Owner
 Moneymaker Insurance & Investments
 468 Main St.
 Anytown, CA 12345

Owner: Samuel Q. Adams

Policy #: APP-2 **Annual** **\$4,100.00**

Insured: Samuel Q. Adams **Benefit:** \$500,000.00

Plan: ABC's Whole Life Series 100 Policy Number: APP-2
 Type: Life Insurance Company: The ABC Insurance Company
 Premium: \$4,100.00

Initiated New Business Action Completed Follow-Up Notes

3/25/2003 Application sent to HO 3/28/2003
 3/26/2003 APS request from Dr. Cutter 4/2/2003 Mary at Cutter's is handling APS. Cost \$45.
 3/28/2003 Chemical Profile 4/4/2003 Appt. is 3/28 at 2pm.

Insured: Samuel Q. Adams **Benefit:** \$4,000.00

Plan: Professional Series Policy Number: 8475
 Type: Disability Company: The ABC Insurance Company
 Premium: \$1,890.00

Initiated New Business Action Completed Follow-Up Notes

4/2/2003 Application Sent To Home Office 4/7/2003
 4/4/2003 EKG Request 4/10/2003 4/9/2003 Needs a treadmill due to medical history.
 4/11/2003 Financial Statement 4/16/2003 Accountant is Henry James at 384-8764

Owner: Thomas H. Jefferson

Policy #: 12345 **Annual** **\$21,006.00**

Insured: Thomas H. Jefferson **Benefit:** \$200,000.00

Plan: The ABC's Premier Universal Life Policy Number: 12345
 Type: Life Insurance Company: The ABC Insurance Company
 Premium: \$21,006.00

Initiated New Business Action Completed Follow-Up Notes

3/17/2003 Application Sent To Home Office 3/21/2003

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As of 6/18/2008

Insured:	Thomas H. Jefferson	Benefit:	\$200,000.00
3/25/2003	Blood Workup	3/31/2003	Roving Medics Appt. 3/25 4pm.
3/25/2003	Chemical Profile		Appt. 3/25 at 4pm.

Insured:	Thomas H. Jefferson	Benefit:	\$100,000.00
Plan:	XYZ Elite 5 Year Renewable Term	Policy Number:	2345
Type:	Life Insurance	Company:	The XYZ Insurance Company
Premium:	\$4,422.00		

Initiated	New Business Action	Completed	Follow-Up	Notes
3/6/2003	Application Sent To Home Office			
3/17/2003	Blood Workup		3/24/2003	Roving Medics appt. at 5:00pm Monday.

Owner:	James Madison
Policy #:	164598
	Annual \$3,310.12

Insured:	James Madison	Benefit:	\$1,300.00
Plan:	Professional Series	Policy Number:	164598
Type:	Disability	Company:	The ABC Insurance Company
Premium:	\$2,070.00		

Initiated	New Business Action	Completed	Follow-Up	Notes
2/7/2008	Application Submitted	2/7/2008		
2/10/2008	APS request from Dr. Cutter		2/15/2008	Check on status of APS with Nancy. Cost \$50.
2/13/2008	Blood Profile	2/19/2008		
2/13/2008	EKG Request	2/19/2008		
2/20/2008	Actuary		6/18/2008	

Insured:	James Madison	Benefit:	\$1,100,000.00
Plan:	ABC's Ultimate Universal Life	Policy Number:	7645372
Type:	Life Insurance	Company:	The ABC Insurance Company
Premium:	\$6,400.00		

Initiated	New Business Action	Completed	Follow-Up	Notes
4/2/2002	Application Sent To Home Office	4/9/2002		
4/8/2002	Vital Capacity Test			Roving Medics will run the test on Mon. at 3pm.
4/10/2002	Attending Physician's Stmt. - Dr. Cutter		4/26/2002	Check with Nancy re: APS. Cost \$50.

Total Premium For Coverages: \$39,888.00
Coverages In Underwriting: 6

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