

Selected Names And Insurance

Sorted By Primary Insured

Policy Number	Company	Plan Of Coverage	Effective	Status	Total Benefit	Annual Premium	Payment & Frequency	Cash Value
James Madison (Jim) Date Of Birth: 6/16/1951 Age: 57		Spouse: Primary Producer: Primary Type:	Dolley Madison (Dolley) Chris Moneymaker Client					
Phones (212) 875-8734 (212) 875-3908 (212) 458-1234		Home Phone Business Fax Cell Phone	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Primary Address James Madison 11407 Constitution Hwy Montpelier Station, VA 22957				
884765764538	XYZ	Homeowner's Plus Ultra	5/1/2003	In Force	\$300,000	\$350.00	\$175.00 Semi-Annual	\$0.00
764538726547	XYZ	ABC Safe Plus Auto Plan	6/3/2003	In Force	\$300,000	\$1,600.00	\$800.00 Semi-Annual	\$0.00
7645372	ABC	ABC's Ultimate Universal Life	4/2/2002	In Force	\$1,100,000	\$6,400.00	\$533.34 Monthly	\$12,450.00
759867	ABC	ABC's Whole Life Series 100	6/1/1991	In Force	\$1,250,000	\$2,300.32	\$197.23 Monthly	\$0.00
6328675	XYZ	XYZ Co. Elite Series LTC	7/7/2006	In Force	\$200	\$2,850.00	\$2,850.00 Annual	\$0.00
342957	ABC	The ABC Co. SPDA 1990 Series	11/1/1999	In Force	\$17,500	\$600.00	\$50.00 Monthly Check	\$16,543.00
27456	ABC	ABC Company Variable Annuity	1/5/2003	In Force	\$250,000	\$4,800.00	\$400.00 Monthly	\$228,862.95
164598	ABC	Professional Series	3/14/2008	Pending	\$1,300	\$2,070.00	\$167.50 Monthly	\$0.00
164598	ABC	Platinum Plan	3/14/2008	Pending	\$170	\$1,240.12	\$0.00 Monthly	\$0.00
						\$22,210.44		\$257,855.95

For This Report Run

Report Totals

\$22,210.44

\$257,855.95

Policy Count	8
Coverage Count	9
Policy Premium Statistics	
Smallest Annual Premium	\$350.00
Largest Annual Premium	\$6,400.00
Average Annual Premium	\$2,835.62