

Portfolio Overview: Protection



Portfolio Valuation [Client Name]

Date _____

Protection Plans: Personal

Financial Institution	Policy Number	Start Date	Maturity Date	Premium	Frequency	Life Cover	Serious Illness Cover	Is Serious Illness Cover Accelerated?	Income Benefit (in the case of PHI)	Deferred Period (in the case of PHI)	Is policy assigned?
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
								N/A	N/A	N/A	
Totals				€ -		€ -	€ -		€ -		

Notes:

Protection Plans: Business

Financial Institution	Policy Number	Start Date	Maturity Date	Premium	Frequency	Life Cover	Serious Illness Cover	Is Serious Illness Cover Accelerated?	Income Benefit (in the case of PHI)	Deferred Period (in the case of PHI)	Is policy assigned?
Totals				€ -		€ -	€ -		€ -		

Notes: