


4 Boxes


By Angus McQueen – Melbourne Victoria Australia
(with credit to Peter Morrison, Auckland New Zealand)




Client: NAME
Review Date: 21 October 2004

LIFE	
Colonial Whole of Life Policy No. 1111111	
Sum Insured	- \$ 114,744.00
Revisionary Bonus	- \$ 17,803.90
Capital Bonus	- \$ 8,032.10
Surrender Value as @ 21/10/04	- \$ 18,572.12
MLC Life Cover Standard 1111111	
Sum Insured:	\$ 292,192.00
Premium:	\$ 633.90 per annum
Premium Due:	26/11/2004

DISABILITY	
Not Yet In Place	

SAVINGS	
200 AMP Shares Value as @ 21/10/04 - \$1,252.00	
800 A V Jennings Shares Value as @ 21/10/04 - \$1,424.00	

RETIREMENT	
Dominion Portfolio Service	
Policy No. 1111111	
Value as at 21/10/2004 - \$ 259,417.15	

Review all Clients this way.

The aim is to review the boxes they have filled, and fill in the boxes with new sales where a box remains empty.

“Not yet in Place” has the client wanting to fill this empty box as well.