

Existing Protection Policies

Use this page to record all your life, critical illness and permanent health insurance policies.
For whole of life and term assurances clearly mark those that are in trust.



Blackstone Moregate
Independent Financial Advisors

You								Sum Assured		Annual Income	
Provider	Policy type	Policy no.	Start	Expiry	Premium	Frq.	In trust	Death	Critical illn.	FIB*	PHI**
Totals											

Partner								Sum Assured		Annual Income	
Provider	Policy type	Policy no.	Start	Expiry	Premium	Frq.	In trust	Death	Critical illn.	FIB*	PHI**
Totals											

Joint								Sum Assured		Annual Income	
Provider	Policy type	Policy no.	Start	Expiry	Premium	Frq.	In trust	Death	Critical illn.	FIB*	PHI**
Totals											

	You	Partner
Do you think that the above arrangements are adequate?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
When were the arrangements last reviewed?		
Would you like us to investigate improving the above policies?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

* FIB = Family Income Benefit.. **PHI = Permanent Health Insurance