



Your Life Insurance Checklist

for preparing Insurance (Life) data entry

- To simplify data entry, see the Handy Notes below before you start.
- This will make entering information easy, simple and quick.

Tip: destroy this sheet once used as a data entry aid.

On the life of Person 1
(list for Person 2 on next page)

First name: _____ Family name: _____

Handy notes:

- A. This checklist is for up to 10 policies on life of Person 1 (Person 2 is on next page)
- B. When entering your Insurance (Life) data ,select the **Protection** type from the list below.
- C. To assist, we have pre-inserted light coloured text for you to overwrite for **Category, Protection and Frequency**.
- D. Always use round figures for amounts throughout your software; calculations are done automatically for you.

Protection types ('A' to 'H')

- A. Payable on death from all causes.
- B. Payable on death by accident.
- C. Total & Permanent Disability—TPD—(own occupation).
- D. Total & Permanent Disability—TPD-(any occupation).
- E. Critical illness—Trauma Cover.
- F. Income protection on self—Individual policy-Benefit per month.
- G. Income protection—Employer owned—Employer paid—Benefit per month.
- H. Income protection—Business-Business expense—Benefit per month.

Data entry tab > Insurance (Life)

Item	Category <u>Personal / Business</u>	Protection type <u>'A' to 'H'</u>	Insurer (Initials)	Policy No	Premium \$ only	Frequency <u>M-Q-H-Y</u>	Insured Amount \$	Owned by
1	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
2	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
3	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
4	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
5	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
6	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
7	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
8	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
9	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
10	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		



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On the life of Person 2
(list for Person 1 on previous page)

First name: _____ Family name: _____

Handy notes:

- A. This checklist is for up to 10 policies on life of Person 1 (Person 2 is on next page)
- B. When entering your Insurance (Life) data ,select the **Protection** type from the list below.
- C. To assist, we have pre-inserted light coloured text for you to overwrite for **Category, Protection and Frequency**.
- D. Always use round figures for amounts throughout your software; calculations are done automatically for you.

Protection types ('A' to 'H')

A. Payable on death from all causes.	<input type="checkbox"/>
B. Payable on death by accident.	<input type="checkbox"/>
C. Total & Permanent Disability—TPD—(own occupation).	<input type="checkbox"/>
D. Total & Permanent Disability—TPD-(any occupation).	<input type="checkbox"/>
E. Critical illness—Trauma Cover.	<input type="checkbox"/>
F. Income protection on self—Individual policy-Benefit per month.	<input type="checkbox"/>
G. Income protection—Employer owned—Employer paid—Benefit per month.	<input type="checkbox"/>
H. Income protection—Business-Business expense—Benefit per month.	<input type="checkbox"/>

Data entry tab > Insurance (Life)

Item	Category <u>Personal / Business</u>	Protection type <u>'A' to 'H'</u>	Insurer (Initials)	Policy No	Premium \$ only	Frequency <u>M-Q-H-Y</u>	Insured Amount \$	Owned by
1	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
2	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
3	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
4	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
5	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
6	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
7	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
8	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
9	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		
10	Personal / Business	A-B-C-D-E-F-G-H				M-Q-H-Y		