

Print Edit Delete Correspondence Wizard Favorites Actions Reports	Insurance New	<input type="text"/> Records and People Search Advanced	Import Control Panel Calendar Global
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essentials » {RECORD NAME} » Auto Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
Auto	GenWorth Financial	23232345	Client
Owner	Status	Plan Type	Plan Name
George Andrews	Open	GerinHope	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

[Select File...](#)

Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual

Agent Information

Company	Website	EMail	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Auto Name	Deductible	Collision Deductible	Comprehensive Deductible
Horseless Carriage	\$ 3,050.00	\$ 2,000.00	\$ 1,500.00
UnInsured Motorists	UM per Accident	Bodily Injury	BI per Accident
\$ 200,000.00	\$ 100,000.00	\$ 10,000.00	\$ 100.00
Under-Insured Motorist per Person	Under-Insured Motorist per Accident	Towing & Labor	Theft - addl. Coverage
\$ 20,000.00	\$ 100,000.00	\$ 100.00	\$ 100,000.00
Medical Payments	Property	Property Damage	Lightning
\$ 3,050.00	\$ 3,050.00	\$ 3,050.00	\$ 3,050.00
Fire	Policy Endorsements	Note	
\$ 3,050.00	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do.	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam,	

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Print	Edit	Delete	Correspondence Wizard	Favorites Actions Reports	Insurance	New	<input type="text"/> Records and People	Advanced	Import	Control Panel	Calendar
Insurance					New		Search		Global		

essentials » {RECORD NAME} » Dental Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
Dental	GenWorth Financial	23232345	Client
Owner	Status	Plan Type	Plan Name
George Andrews	Open	GerinHope	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual

Agent Information

Company	Website	EEmail	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Coverage	Individual Deductible	Family Deductible
First Colony Insurance	\$ 3,050.00	\$ 2,000.00

Note

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Print	Edit	Delete	Correspondence Wizard	Favorites Actions Reports	Insurance	New	<input type="text"/>	Advanced	Import	Control Panel Global	Calendar
Insurance							Search				

essentials » {RECORD NAME} » Disability Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
Disability ▼	GenWorth Financial	23232345	Client ▼
Owner	Status	Plan Type	Plan Name
George Andrews	Open ▼	GerinHope ▼	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual ▼

Agent Information

Company	Website	EEmail	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Disability Type	Definition of Disability	Maximum Benefit	Monthly Benefit
		\$ 2,000.00	\$ 1,500.00
Waiting Period	Maximum Benefit Accident Age	Maximum Benefit Sickness Age	Percent of Income
	\$ 10,000.00	\$ 100.00	000 %

Note

- ☐ Guaranteed Renewable
- ☐ Waiver of Premium
- ☐ Non-Cancel

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Print	Edit	Delete	Correspondence Wizard	Favorites	Actions	Reports
Insurance						
New		<input type="text" value="Records and People"/>		Advanced		
Import		Control Panel	Calendar			
Global						

essentials » {RECORD NAME} » Health Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
Health	GenWorth Financial	23232345	Client
Owner	Status	Plan Type	Plan Name
George Andrews	Open	GerinHope	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual

Agent Information

Company	Website	Email	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Personal Deductible	Co-Insurance Percent	Stop Loss Limit	Lifetime Maximum
\$ 2,000.00	000 %	\$ 1,500.00	\$ 1,500.00
Not Payment			
\$ 10,000.00	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam,		

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     Favorites Actions Reports	 Insurance	<input type="text"/>  Records and People	 Advanced	 Import  Control Panel  Calendar
Insurance		Search		Global

essentials » {RECORD NAME} » Homeowners Insurance » Genworth Financial

Type Homeowners	Issuing Company GenWorth Financial	Policy Number 23232345	Insured Client
Owner George Andrews	Status Open	Plan Type GerinHope	Plan Name 7/9/2012
Policy Date 7/9/2012	Expiration Date 7/9/2012	Policy Receipt Signature Date 7/9/2012	Policy Document Policy.pdf

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Payment Information

Premium Due 7/9/2012	Amount \$ 3,050.00	Frequency Annual
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Agent Information

Company First Colony Insurance	Website http://firstcolony.com/agent=deweyc	E Mail deweyc@firstcolony.com	Phone (919) 555-5555 x5555
Agent Dewey C.	Agent Code	1st Year Commission \$ 3,050.00	Renewal Commission \$ 3,050.00

Insurance Information

Home Name	Deductible \$ 3,050.00	Policy Form	Personal Liability \$ 1,500.00
Covered	Personal Property \$ 100,000.00	Dwelling \$ 10,000.00	Other Structures \$ 100.00
Contents Replacement \$ 20,000.00	Loss of Use	Limits \$ 100.00	
Other Endorsements Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore.		Note Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod.	

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Print

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Correspondence Wizard

Favorites

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Type	Issuing Company	Policy Number	Insured
Life	GenWorth Financial	23232345	Client
Owner	Status	Plan Type	Plan Name
George Andrews	Open	GerinHope	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual

Agent Information

Company	Website	EEmail	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Face Value	Cash Value	Cash Value Date	Current Death Benefit
\$ 3,050.00	\$ 3,050.00	7/9/2012	\$ 1,500.00
Surrender Value Current Year	Surrender Value Previous Year	Dividend	Cash Value Interest Rate
\$ 200,000.00	\$ 100,000.00	\$ 10,000.00	\$ 100.00
Last Ledger Date	Loan Amount	Loan Balance on Policy	Loan Interest Rate
7/9/2012	\$ 100,000.00	\$ 100.00	000 %

☐ Include in Estate

☐ Use Death Benefit

☐ Probate

Note

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Primary Beneficiary

Joe Andrews

80%

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Secondary Beneficiary

Jane Andrews

20%

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Add Primary Beneficiary

Add Secondary Beneficiary

Edit

Print

Edit

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essentials » {RECORD NAME} » Long Term Care Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
Long Term Care	GenWorth Financial	23232345	Client
Owner	Status	Plan Type	Plan Name
George Andrews	Open	GerintHope	7/9/2012
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
7/9/2012	7/9/2012	7/9/2012	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
7/9/2012	\$ 3,050.00	Annual

Agent Information

Company	Website	EMail	Phone
First Colony Insurance	http://firstcolony.com/agent=deweyc	deweyc@firstcolony.com	(919) 555-5555 x5555
Agent	Agent Code	1st Year Commission	Renewal Commission
Dewey C.		\$ 3,050.00	\$ 3,050.00

Insurance Information

Issue Age	Premium Incremental Points	Policy Maximum Benefit	Insurance Company Rating
		\$ 1,500.00	
Benefit Period	Waiting Period	Accumulation Period	Inflation Increment Levels
Inflation Rate & Method	Product Upgrade	<input type="checkbox"/> Waiver of Premium <input type="checkbox"/> Inflation Prtection <input type="checkbox"/> Mental Illness	

Nursing Home

Indemnity	Maximum Benefit	Care Beneficiary
\$ 10,000.00	\$ 1,500.00	Dewey C.

Home Health Care

Indemnity	Maximum Benefit	Care Beneficiary
\$ 10,000.00	\$ 1,500.00	Dewey C.

Assisted Living Facility

Indemnity	Maximum Benefit	Care Beneficiary
\$ 10,000.00	\$ 1,500.00	Dewey C.

Adult Day Care

Indemnity	Maximum Benefit	Care Beneficiary
\$ 10,000.00	\$ 1,500.00	Dewey C.

Waiver of Premium Text

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Print	Edit	Delete	Correspondence Wizard	Favorites Actions Reports	Insurance	New	<input type="text"/>	Records and People Advanced	Import	Control Panel Global	Calendar
Insurance							Search				

essentials » {RECORD NAME} » Umbrella Insurance » Genworth Financial

Type	Issuing Company	Policy Number	Insured
<input type="text" value="Umbrella"/>	<input type="text" value="GenWorth Financial"/>	<input type="text" value="23232345"/>	<input type="text" value="Client"/>
Owner	Status	Plan Type	Plan Name
<input type="text" value="George Andrews"/>	<input type="text" value="Open"/>	<input type="text" value="GerinHope"/>	<input type="text" value="7/9/2012"/>
Policy Date	Expiration Date	Policy Receipt Signature Date	Policy Document
<input type="text" value="7/9/2012"/>	<input type="text" value="7/9/2012"/>	<input type="text" value="7/9/2012"/>	Policy.pdf

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Payment Information

Premium Due	Amount	Frequency
<input type="text" value="7/9/2012"/>	\$ <input type="text" value="3,050.00"/>	<input type="text" value="Annual"/>

Agent Information

Company	Website	EMail	Phone
<input type="text" value="First Colony Insurance"/>	<input type="text" value="http://firstcolony.com/agent=deweyc"/>	<input type="text" value="deweyc@firstcolony.com"/>	<input type="text" value="(919) 555-5555 x5555"/>
Agent	Agent Code	1st Year Commission	Renewal Commission
<input type="text" value="Dewey C."/>	<input type="text"/>	\$ <input type="text" value="3,050.00"/>	\$ <input type="text" value="3,050.00"/>

Insurance Information

Auto Bodily Injury	Auto Property Damage	Homeowners Coverage	Policy Limit
\$ <input type="text" value="2,000.00"/>	\$ <input type="text" value="10,000.00"/>	\$ <input type="text" value="1,500.00"/>	\$ <input type="text" value="1,500.00"/>

Note

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