

# Claims Service

## Total Claims Paid from 2017



*Being there when it matters most*



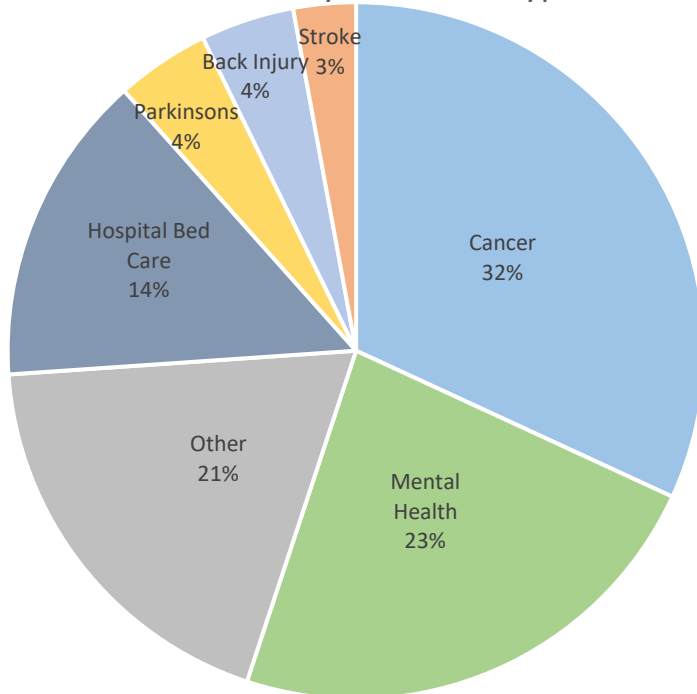
Succession Matters has positively **impacted** our clients' lives, with claims paid in excess of

# \$29,003,199

*We are greatly thankful to Luke and his wonderful team for patient and persistent guidance on our life insurance matters and suggestion in making a claim, we did not know about, for my breast cancer from 2019. Succession Matters assisted me with ALL the claims paperwork and communications; and the process was smooth and swift. The payout allowed us to bring forward retirement plans and to bless other people in need.*

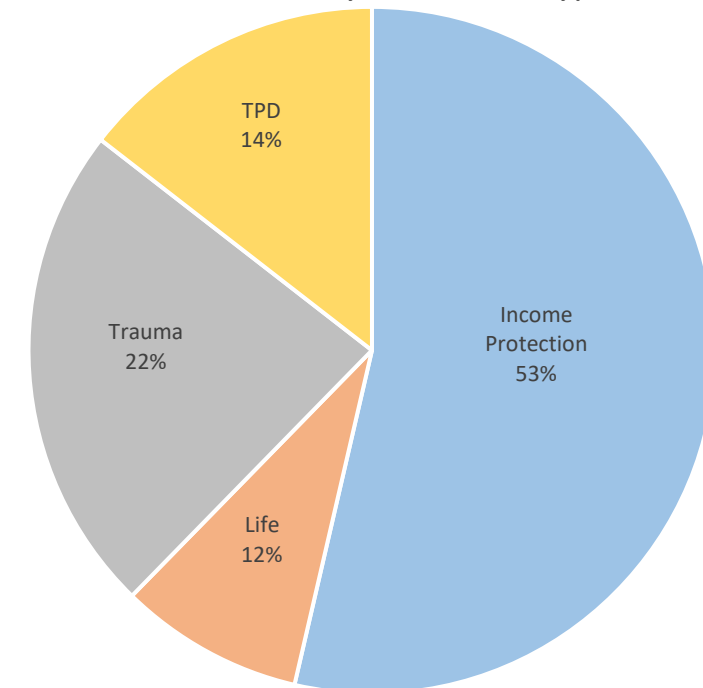
*Sandra, January 2023*

Total # Claims by **Condition Type**



*“Exceptional service requires extraordinary care”*

Total # Claims by **Protection Type**



# Claims Service

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Condition	Insurer	Sex	Age	Employment	Amount	Occupation	Type
<b>INCOME PROTECTION</b>							
Anal Fissure	MLC	M	52	SEP	\$32,900	Vet	AE
Arm Injury / Stroke	MLC	M	48	SEP	\$205,242*	Pharmacist	A
Back Injury	CommInsure	M	54	SEP	\$99,178	Electrician	IND
Back Injury	MLC	M	36	EMP	\$6,615	Operations Co-ordinator	AE
Back Injury	OnePath	F	43	E	\$33,943	Office Manager	IND
Bicycle Accident	Resolution Life	M	52	E	\$27,553*	Doctor	A
Breast Cancer	TAL	F	48	E	\$58,286	Town Planner	IND
Breast Cancer – Reconstruction	MLC	F	43	SEP	\$5,890	Pharmacist	A
Cancer	Zurich	M	54	SEP	\$949,539*	Doctor	A
Cancer	Zurich	M	54	SEP	\$69,720	Doctor	BE
Damaged Shoulder	Zurich	M	47	SEP	\$97,296	Plasterer	AE
Death Benefit	MLC	M	50	SEP/E	\$121,336	Doctor	AE
Hand Injury	Zurich	M	35	SEP	\$367,725*	Electrician	A
Hospital Bed Care	Asteron	M	49	SEP	\$22,040	Financial Planner	A
Hospital Bed Care	Zurich	M	51	SEP	\$3,224	Doctor	A
Hospital Bed Care	Zurich	M	62	SEP	\$636	Pharmacist	A
Hospital Bed Care	Zurich	F	58	SEP	\$5,426	Barrister	A
Hospital Bed Care	Asteron	M	48	SEP	\$33,173	Truck Driver	A
Hospital Bed Care	Zurich	M	48	E	\$1,377	Geologist	A
Hospital Bed Care	Zurich	M	48	EMP	\$8,072	Pharmacist	A
Hospital Bed Care	Zurich	M	55	SEP	\$6,323	IT Engineer	A
Hospital Bed Care	MLC	F	43	SEP	\$1,473	Pharmacist	A
Hospital Bed Care	AMP	M	52	E	\$1,294	Doctor	A
Hospital Bed Care	MLC	F	33	E	\$830	Doctor	AE
Illness	Surich	F	45	E	\$68,385*	Lawyer	A
Mental Health	Zurich	M	55	SEP	\$576,909*	IT Engineer	A
Mental Health	AIA	F	57	SEP	\$152,536	Injury Specialist	IND
Mental Health	OnePath	M	50	SEP	\$4,093	Photographer	IND
Mental Health	Aus Super	M	28	E	\$31,730	Social Worker	IND
Mental Health	Zurich	M	48	EMP	\$234,778*	Pharmacist	A
Mental Health	AMP	M	57	SEP	\$582,710*	Builder	AE
Mental Health	CommInsure	M	56	SEP	\$412,703*	Director	A
Mental Health	Asteron	M	46	E	\$1,345,510*	CEO	A
Mental Health	MLC	M	42	E	\$130,356*	Accountant	A
Mental Health	REST (AI)	F	42	E	\$51,184	Driver	IND

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Multiple Sclerosis	Hesta Super	M	28	E	\$18,879	Social Worker	IND
Myalgic Encephalomyelitis	OnePath	M	53	SEP	\$407,517*	Company Director	A
Parkinson's Disease	AMP	M	63	E	\$190,691	Director	A
Shoulder Damage	AIA	M	48	SEP	\$77,109	Courier	AU
Stroke & Cerebral Haemorrhage	Asteron	M	39	E	\$1,156,917*	Manager	A
Wrist Injury	Zurich	M	50	SEP	\$238,922*	Plasterer	A
<b>TOTAL INCOME PROTECTION CLAIMS PAID</b>					<b>\$7,840,018</b>		

### LEGEND

*Ongoing Claim	A - Agreed
E – Employed	IND – Indemnity
SEP – Self-Employed	BE – Business Expense
AE – Agreed Endorsed	AU – Agreed Unverified

# Claims Service

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Condition	Insurer	Sex	Age	Employment	Amount	Occupation	Type
LIFE							
Breast Cancer	Mercer	F	55	E	\$915,430	Flight Operations Mngr	TIB
Cancer	MLC	M	50	SEP/E	\$3,675,000	Doctor	Death
Cancer	AIA	M	76	RET	\$100,984	Retired	Death
Haematological Malignancy	Resolution Life	M	72	E	\$552,552	Architect	TIB
Heart Disease / Prostate Cancer	AMP	M	70	SEP	\$52,500	General Manager	Death
Heart Failure	QBE	M	39	E	\$85,000	Paramedic	ADC
Leukemia	CommInsure	M	68	SEP	\$544,466	Business Owner	Death
Pneumonia	Zurich	M	71	RET	\$1,008,099	Geologist	Death
Suicide	Zurich	M	50	SEP	\$2,438,082	Solicitor	Death
TOTAL LIFE CLAIMS PAID					\$9,372,113		
TRAUMA							
Breast Cancer	Zurich	F	53	SEP	\$147,746	Office Manager	Full
Breast Cancer	TAL	F	48	E	\$26,802	Town Planner	Full
Breast Cancer	CommInsure	F	60	E	\$105,000	Office Manager	Full
Breast Cancer	Zurich	F	54	E	\$296,796	Physiotherapist	Full
Cancer	OnePath	M	54	SEP	\$441,000	Doctor	Full
Cancer	CommInsure	M	72	SEP	\$200,000	Director	Full
Cardiomyopathy	CommInsure	M	66		\$487,376		Full
Heart Surgery	AMP	M	65	SEP	\$467,640	Architect	Full
Leukemia	AMP	M	67	SEP	\$400,000	Architect	Full
Leukemia	CommInsure	M	67	SEP	\$108,000	Business Owner	Full
Melanoma	MLC	M	44	SEP	\$20,000	Resort Manager	Partial
Melanoma	MLC	F	50	E	\$14,775	Registered Nurse	Partial
Prostate Cancer	CommInsure	M	57	SEP	\$519,585	Accountant	Full
Prostate Cancer	Asteron	M	58	E	\$34,207	Credit & Loans Officer	Partial
Prostate Cancer	MLC	M	69	E	\$296,481	Director	Full
Rheumatoid Arthritis	MLC	F	49	SEP	\$843,951	Medical Professional	Full
Testicular Cancer	MLC	M	50	E	\$525,000	Medical Specialist	Full
TOTAL TRAUMA CLAIMS PAID					\$4,934,359		

# Claims Service

## Total Claims Paid from 2017

Condition	Insurer	Sex	Age	Employment	Amount	Occupation	Type
<b>TPD</b>							
Mental Health	Asteron Life	M	47	E	\$1,389,150	CEO	Own Occ
Mental Health	BT	M	47	E	\$1,095,756	CEO	Any Occ
Mental Health	CommInsure	M	58	SEP	\$1,045,704	Managing Director	Any Occ
Mental Health	AusSuper	M	28	E	\$168,000	Social Worker	Any Occ
Mental Health	GESB	M	56	E	\$200,000	Social Worker	Any Occ
Mental Health	CommInsure	M	59	E	\$284,900	Manager	Any Occ
Mental Health	Zurich	M	458	E	\$603,477	Pharmacist	Own Occ
Mental Health	GESB	M	28	E	\$212,000	Social Worker	Any Occ
Parkinson's	CBus	M	54	E	\$220,000	Electrician	Any Occ
Parkinson's	Colonial Super	M	54	E	\$537,080	Electrician	Any Occ
Shoulder Injury	Zurich	M	38	SEP	\$1,100,642	Electrician	Any Occ
<b>TOTAL TPD CLAIMS PAID</b>					<b>\$6,856,710</b>		

#### LEGEND

E – Employed  
 SEP – Self-Employed  
 Any Occ – Any Occupation  
 Own Occ – Own Occupation