

Claims Service Total Claims Paid from 2017



Being there when it matters most

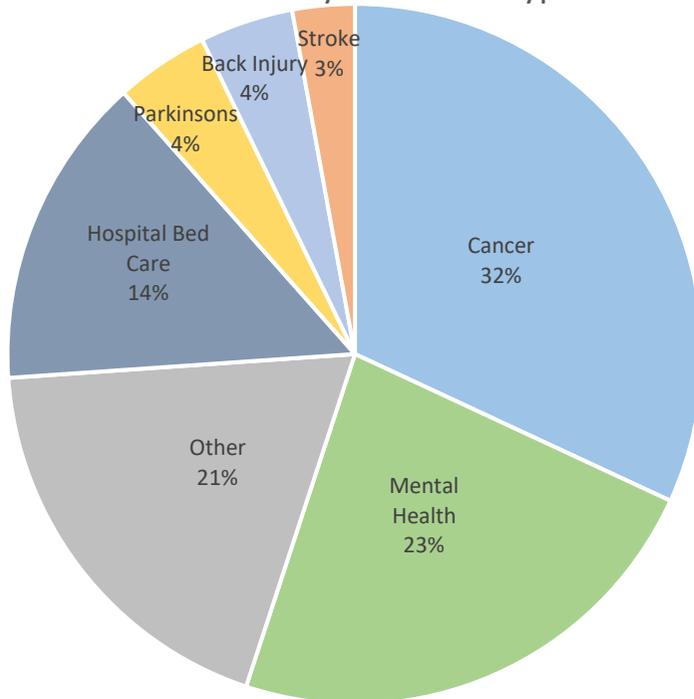


Succession Matters has positively **impacted** our clients' lives, with claims paid in excess of

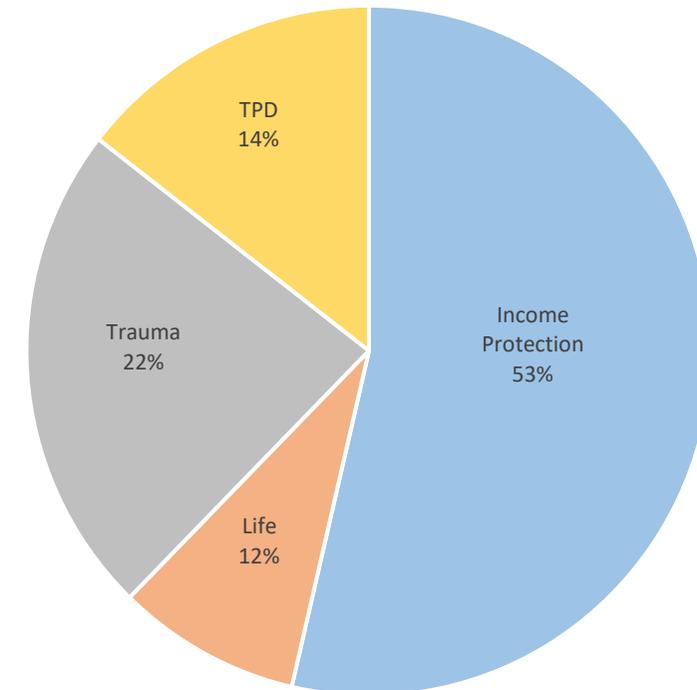
We are greatly thankful to Luke and his wonderful team for patient and persistent guidance on our life insurance matters and suggestion in making a claim, we did not know about, for my breast cancer from 2019. Succession Matters assisted me with ALL the claims paperwork and communications; and the process was smooth and swift. The payout allowed us to bring forward retirement plans and to bless other people in need.
Sandra, January 2023

\$29,003,199

Total # Claims by **Condition Type**



Total # Claims by **Protection Type**



“Exceptional service requires extraordinary care”

Claims Service

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Condition	Insurer	Sex	Age	Employment	Amount	Occupation	Type
INCOME PROTECTION							
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
TOTAL INCOME PROTECTION CLAIMS PAID					\$7,840,018		

LEGEND

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

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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		

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TPD							
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
TOTAL TPD CLAIMS PAID					\$6,856,710		

LEGEND

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