

Consignor Sales Management Insurance Module Overview

Insurance Tracking Screen

Hip/Name/Sire/Dam	0251	98 Silverbulletday	Artax	Silverbulletday
Purchased From/Price	Saratoga99		\$150,000	Active Insurance <input checked="" type="checkbox"/>
Sex/DOB/Color	Filly	3/12/98	dk. b./br.	
Current Sale	September99			

Horse Owner Information		
ClientID	Percent Owned	Decline Insurance
▶ MorrisonVan	100.00000%	<input type="checkbox"/>
*	0.00000%	<input type="checkbox"/>

Insurance Information													
CurrentPc	EffDate	ExpDate	CancelDate	Policy	InsuredAmt	Wh Horse Val	Rate	Premium	Surcharge	Surcharge Am	Tot Premium	Comments	Credits
<input type="checkbox"/>	5/1/2007	11/1/2007		123456	\$200,000	\$250,000	2.737227%	\$5,474.45	1.50%	\$82.12	\$5,556.57		\$0.00
<input checked="" type="checkbox"/>	9/25/2007	3/25/2008		123456	\$275,000	\$300,000	2.737227%	\$7,527.37	1.50%	\$112.91	\$7,640.28		\$0.00
* <input type="checkbox"/>													\$0.00

Field Names in the Insurance Information:

Current Policy	Insured Amt	Surcharge Amt (Calculated)
Effective Date	Whole Horse Value	Total Premium (Calculated)
Exp Date	Rate	Comments
Cancel Date	Premium	Credits
Policy #	Surcharge	

This is the entry screen for the Insurance Information. A few things to note:

- The module has the added ability to track where the horse was purchased and the purchase price.
- The module provides one repository for all history information so that you can easily see how the insured amounts have changed.
- Premium & Surcharge amount are calculated fields.
- Horse, owner and policy history are on one screen so that the information is easy to manipulate.



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This report shows horse information along with the policy history so that you can easily see the policy changes.

Insurance Policy History by Horse Name

<u>Name/Sire/Dam</u>					<u>Sex</u>	<u>DOB</u>	<u>LBD</u>	<u>Status</u>	<u>InFoalTo</u>	<u>Purchased From</u>	<u>Purchase Price</u>	<u>Active</u>	
98 Bourbon Belle/Real Quiet/Bourbon Belle					Colt	4/7/98						<input checked="" type="checkbox"/>	
<u>Cur Pol</u>	<u>EffDate</u>	<u>Policy</u>	<u>Exp Date</u>	<u>Canc Date</u>	<u>Insured Amount</u>	<u>Percent</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>TotPremium</u>
<input checked="" type="checkbox"/>	5/9/2007	456789	11/9/2007		\$125,000		2.911000%	1.50%	\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
98 Patchen Beauty/Victory Gallop/Patchen Beaut					Colt	5/12/98							<input checked="" type="checkbox"/>
<u>Cur Pol</u>	<u>EffDate</u>	<u>Policy</u>	<u>Exp Date</u>	<u>Canc Date</u>	<u>Insured Amount</u>	<u>Percent</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>TotPremium</u>
<input checked="" type="checkbox"/>	9/1/2007	123456	3/1/2008		\$50,000		2.737227%	1.50%	\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
98 Silverbulletday/Artax/Silverbulletday					Filly	3/12/98				Saratoga99	\$150,000		<input checked="" type="checkbox"/>
<u>Cur Pol</u>	<u>EffDate</u>	<u>Policy</u>	<u>Exp Date</u>	<u>Canc Date</u>	<u>Insured Amount</u>	<u>Percent</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>TotPremium</u>
<input checked="" type="checkbox"/>	9/25/2007	123456	3/25/2008		\$275,000		2.737227%	1.50%	\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
<input type="checkbox"/>	5/1/2007	123456	11/1/2007		\$200,000		2.737227%	1.50%	\$5,474.45	\$82.12	\$5,556.57	\$0.00	\$5,556.57
98 Sweeping Story/Wild Event/Sweeping Story					Mare	4/14/98		Barren					<input checked="" type="checkbox"/>
<u>Cur Pol</u>	<u>EffDate</u>	<u>Policy</u>	<u>Exp Date</u>	<u>Canc Date</u>	<u>Insured Amount</u>	<u>Percent</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>TotPremium</u>
<input checked="" type="checkbox"/>	9/1/2007	13579	3/1/2008		\$60,000		2.737227%	1.50%	\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97



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Consignor Sales Management Insurance Module Overview

This report lists horses on each policy so that you have an accurate reference that is easy to generate.

Insurance Premiums by Policy

<u>Name/Sire/Dam</u>	<u>Purchase Price</u>	<u>Insured Amount</u>	<u>Whole Horse Val</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>Tot Premium</u>
123456										
98 Patchen Beauty/Victory Gallop/Patchen Beauty		\$60,000	\$50,000	2.737227%	1.50%	\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
98 Silverbulletday/Artax/Silverbulletday	\$150,000	\$275,000	\$300,000	2.737227%	1.50%	\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
		\$325,000				\$8,895.99	\$133.44	\$9,029.43	\$0.00	\$9,029.43
13579										
98 Sweeping Story/Wild Event/Sweeping Story		\$60,000	\$75,000	2.737227%	1.50%	\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97
		\$60,000				\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97
456789										
98 Bourbon Belle/Real Quiet/Bourbon Belle		\$125,000	\$125,000	2.911000%	1.50%	\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
		\$125,000				\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33



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This report shows horses with policy amount; it excludes owners that have declined insurance so that you don't have to manually calculate premiums on partnership horses. ***The module will also have the ability to send basic statements to owners.***

Insurance Premiums by Horse Name

<u>Name/Sire/Dam</u>	<u>Insured Amount</u>	<u>Whole Horse Val</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>Tot Premium</u>
98 Bourbon Belle/Real Quiet/Bourbon Belle	\$125,000	\$125,000	2.911000%	1.50%	\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
Owner	<input type="checkbox"/> Decline	<input type="checkbox"/> % Owned			Owner Premium	Owner SC	Owner Net	Own Credits	Owner Tot
Ms. Dana Scully	<input type="checkbox"/>	100.00%			\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
98 Patchen Beauty/Victory Gallop/Patchen Beauty	\$50,000	\$50,000	2.737227%	1.50%	\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
Owner	<input type="checkbox"/> Decline	<input type="checkbox"/> % Owned			Owner Premium	Owner SC	Owner Net	Own Credits	Owner Tot
Mr. Elvis Costello	<input type="checkbox"/>	100.00%			\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
98 Silverbulletday/Artax/Silverbulletday	\$275,000	\$300,000	2.737227%	1.50%	\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
Owner	<input type="checkbox"/> Decline	<input type="checkbox"/> % Owned			Owner Premium	Owner SC	Owner Net	Own Credits	Owner Tot
Mr. Van Morrison	<input type="checkbox"/>	100.00%			\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
98 Sweeping Story/Wild Event/Sweeping Story	\$60,000	\$75,000	2.737227%	1.50%	\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97
Owner	<input type="checkbox"/> Decline	<input type="checkbox"/> % Owned			Owner Premium	Owner SC	Owner Net	Own Credits	Owner Tot
Ms. Dana Scully	<input type="checkbox"/>	50.00%			\$1,026.46	\$15.40	\$1,041.86	\$0.00	\$1,041.86
Sales Systems & Solutions, LLC Ms. Rene Thompson	<input checked="" type="checkbox"/>	20.00%			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mr. Elvis Costello	<input type="checkbox"/>	15.00%			\$307.94	\$4.62	\$312.56	\$0.00	\$312.56
REM, LLC Mr. Peter Buck	<input type="checkbox"/>	15.00%			\$307.94	\$4.62	\$312.56	\$0.00	\$312.56



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This report shows policies by expiration date so that you can plan for upcoming premiums.

Insurance Policies by Expiration Date

<u>ExpDate:</u>	<u>Name/Sire/Dam</u>	<u>Purchase Price</u>	<u>Insured Amount</u>	<u>Whole Horse Val</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>Tot Premium</u>
Expiring: Nov/2007											
11/9/2007	98 Bourbon Belle/Real Quiet/Bourbon Belle Policy: 456789		\$125,000	\$125,000	2.911000%	1.50%	\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
			\$125,000				\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
Expiring: Mar/2008											
3/1/2008	98 Patchen Beauty/Victory Gallop/Patchen Beauty Policy: 123456		\$50,000	\$50,000	2.737227%	1.50%	\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
3/1/2008	98 Sweeping Story/Wild Event/Sweeping Story Policy: 13579		\$60,000	\$75,000	2.737227%	1.50%	\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97
3/25/2008	98 Silverbulletday/Artax/Silverbulletday Policy: 123456	\$150,000	\$275,000	\$300,000	2.737227%	1.50%	\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
			\$385,000				\$10,538.32	\$158.07	\$10,696.40	\$0.00	\$10,696.40



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This report shows horses that have sold in a sale and still have an active insurance policy so that you can make sure the policies are cancelled in a timely manner.

Sold Horses with Active Policies

<u>Sale Status</u>	<u>Name/Sire/Dam</u>	<u>Purchase Price</u>	<u>Insured Amount</u>	<u>Whole Horse Val</u>	<u>Rate</u>	<u>Surcharge</u>	<u>Premium</u>	<u>Surcharge Amt</u>	<u>Net</u>	<u>Credits</u>	<u>Tot Premium</u>
Sold: Sep/1999											
In											
9/14/1999	98 Silverbulletday/Artax/Silverbulletday Policy: 123456	\$150,000	\$275,000	\$300,000	2.737227%	1.50%	\$7,527.37	\$112.91	\$7,640.28	\$0.00	\$7,640.28
9/16/1999	98 Patchen Beauty/Victory Gallop/Patchen Beauty Policy: 123456		\$60,000	\$50,000	2.737227%	1.50%	\$1,368.61	\$20.53	\$1,389.14	\$0.00	\$1,389.14
9/20/1999	98 Sweeping Story/Wild Event/Sweeping Story Policy: 13579		\$60,000	\$75,000	2.737227%	1.50%	\$1,642.34	\$24.64	\$1,666.97	\$0.00	\$1,666.97
RNA											
9/14/1999	98 Bourbon Belle/Real Quiet/Bourbon Belle Policy: 456789		\$125,000	\$125,000	2.911000%	1.50%	\$3,638.75	\$54.58	\$3,693.33	\$0.00	\$3,693.33
			\$510,000				\$14,177.07	\$212.66	\$14,389.73	\$0.00	\$14,389.73



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