

# Whole Life Insurance Surrender Payment Statement

Sample Document – For Reference Purposes Only

## Policy Information

Policyholder Name: Jane Doe  
Policy Number: WL-987654321  
Issue Date: March 15, 2014  
Surrender Date: June 20, 2024  
Insured Amount: \$100,000.00  
Owner: Jane Doe

## Surrender Value Breakdown

Description	Amount (USD)
Cash Surrender Value	\$23,540.00
Less: Outstanding Policy Loan	(\$3,000.00)
Less: Loan Interest	(\$115.60)
Less: Surrender Charge	(\$460.00)
Less: Unpaid Premiums	(\$0.00)
Net Surrender Payment	\$19,964.40

## Payment Details

Payee Name: Jane Doe  
Payment Method: Bank Transfer  
Expected Payment Date: June 28, 2024

## Notes:

- This statement reflects the full surrender and cancellation of the Whole Life Insurance policy listed above.
- The net surrender payment is subject to final review and verification by the insurer.
- If you have any questions regarding this statement, please contact your insurance agent or our customer support team.