

# Endowment Plan Surrender Value Calculation Sheet

Sample Document

## Policy Information

Policy Number:

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Policyholder Name:

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Commencement Date:

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Term (years):

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Sum Assured:

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Total Premium Paid:

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## Calculation Details

Year	Premium Paid	Bonus Accrued	Guaranteed Surrender Value	Special Surrender Value	Selected Surrender Value
1	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____
...	_____	_____	_____	_____	_____

## Summary

Total Premiums Paid:

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Total Bonus Accrued:

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Surrender Value Payable:

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Charge/Deductions (if any):

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Net Amount Payable:

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Remarks:

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