

# Assured Wealth Plan

## Plan at a glance

### Key Benefits :

- ❖ Guaranteed 200% of SA at Maturity
- ❖ Waiver of Premium in Option 2 in case of Premature Death.
- ❖ High SA rebate
- ❖ Extended entry age till 60 years of age.

### Case Study :

Age – 30 Years, PT – 20 Years, PPT – 10 Years, Premium - 100763, SA - 1150000



Total Premium Paid	Total Guaranteed Maturity Amount	IRR
1007630	2300000	5.39%

- ❑ If we invest in other instruments other than Insurance, we may get the same return but due to TAX implication the actual return will be much lesser, so the IRR – Below is the example at 30% TAX slab.

Payment Term - 10 Years, Maturity Term – 20 Years, Yearly Installments - 100763, Total Maturity - 2300000

Total amount invested	Total Guaranteed Return	Return after TAX implication (Old Regime)	IRR
1007630	2300000	1912289	4.17%

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### Case Study :

Age – 30 Years, PT – 20 Years, PPT – 10 Years, Premium - 200212, SA - 2285003



Total Premium Paid	Total Guaranteed Maturity Amount	IRR
2002120	4570023	5.39%

- ❑ If we invest in other instruments other than Insurance, we may get the same return but due to TAX implication the actual return will be much lesser, so the IRR – Below is the example at 30% TAX slab.

Payment Term - 10 Years, Maturity Term – 20 Years, Yearly Installments - 200212, Total Maturity - 4570023

Total Amount Invested	Total Guaranteed Return	Return after TAX implication (Old Regime)	IRR
2002120	4570023	3799652	4.17%

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### Case Study :

Age – 30 Years, PT – 20 Years, PPT – 10 Years, Premium - 500310, SA - 5710000

Total Premium Paid	Total Guaranteed Maturity Amount	IRR
5003100	11420000	5.39%

- ❑ If we invest in other instruments other than Insurance, we may get the same return but due to TAX implication the actual return will be much lesser, so the IRR – Below is the example at 30% TAX slab.

Payment Term - 10 Years, Maturity Term – 20 Years, Yearly Installments - 500310, Total Maturity - 11420000

Total Amount Invested	Total Guaranteed Return	Return after TAX implication (Old Regime)	IRR
5003100	11420000	9494930	4.17%



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### **Case Study :**

Age – 30 Years, PT – 20 Years, PPT – 10 Years, Premium - 1007630, SA - 11500000



Total Premium Paid	Total Guaranteed Maturity Amount	IRR
10076300	23000000	5.39%

- ❑ If we invest in other instruments other than Insurance, we may get the same return but due to TAX implication the actual return will be much lesser, so the IRR – Below is the example at 30% TAX slab.

Payment Term - 10 Years, Maturity Term – 20 Years, Yearly Installments - 10076300, Total Maturity - 23000000

Total Amount Invested	Total Guaranteed Return	Return after TAX implication (Old Regime)	IRR
10076300	23000000	19122890	4.17%