1. What is an Income Protection Summary?

An Income Protection Summary (IP summary) is a document which contains information regarding the amounts you have paid for your Income Protection policy during the financial year ending 30 June 2020. We recommend you take this IP summary to a registered tax agent when preparing your tax return.

2. When will my IP summary become available?

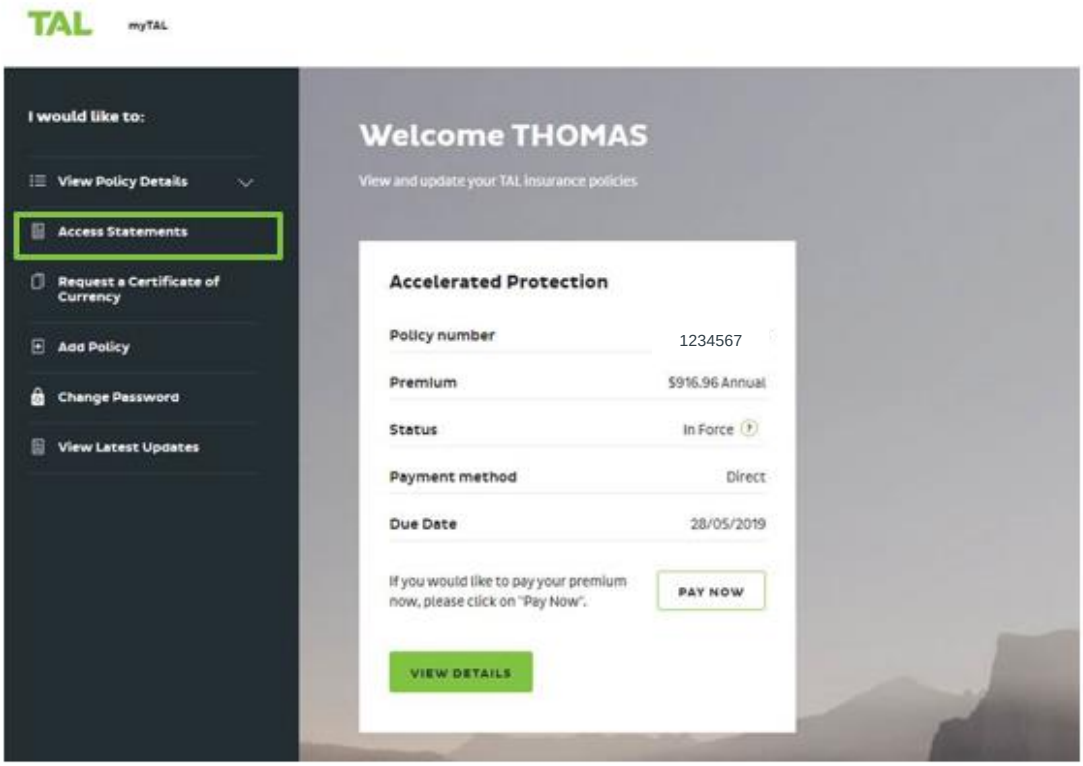
IP summaries will be mailed or emailed to you between 14 - 31 July.

3. How can I access my IP Summary?

If you have opted to receive email communications, your summary will be emailed to you. If you have requested to have all communications posted to you, you will receive your summary in the mail. You can also access and download your summary through myTAL.

4. How do I download my IP Summary from myTAL?

a. Login to MyTAL
b. Select 'Access Statements' on the left had side
c. Select a policy from the policy drop down box
d. Select the statement from the statement from down box



5. Will my financial adviser get a copy of my IP summary?

Yes, your advisers will be able to access a copy of your IP summary from 28 July.

6. I haven't yet received my IP Summary. Who do I contact about this?

It may take till the end of July for you to receive your summary. However, there are a few reasons you may not receive an IP summary including:

- Your Income Protection cover is funded through Superannuation
- You did not pay any premiums during the 2019-2020 Financial Year
- You made an Income Protection claim during the 2019-2020 financial year.

We recommend you check in with your financial adviser if any of the listed reasons apply to you.

7. I made a claim in the 2019-2020 financial year and haven't received my IP summary? How do I organise one for my policy?

We recommend you discuss this with your financial adviser and call the claims team to organise a summary.

8. Will I receive an IP payment for my Life Insurance, TPD or Recovery Insurance policies?

No, you will not receive any payment summaries for any other policies, summaries are only available from Income Protection policies.

9. How do I register for myTAL?

To register for My TAL:

a. Go to our registration page and enter your email address
b. Click on 'send confirmation email'
c. Go to your email and click on the link within the confirmation email
d. Complete the registration details