



Insurance Contract and getting the insurance portfolio

Life insurance review in compliance with fiscal and legal issues

Positive aspects for Partner

Possible risks

-
- _ Liability for transfers – exemption of consulting risks
 - _ Confidence in compliance with legal and fiscal issues
 - _ Confidentiality
-

Maintenance and management

-
- _ Professional services on general insurance matters
 - _ Implementation of standard procedures regardless of the insurance company
 - _ Reduction of the administrative costs
 - _ Meetings with clients are conducted by professional consultants
 - _ Management/Storage of all documentation (higher safety standards)
-

Optimization

-
- _ Focus on core business
 - _ Expanding of the offered services at no additional cost
 - _ The elimination or adjustment of the provisions of the contract
 - _ Right of retention
-

AM PLUS Ltd.

-
- _ Know-how in the field of insurance and taxation
 - _ The possibility of getting the consultant's services
 - _ Professional support during and at the expiration of the contract
-

Implementation

Required documentation

-
- _ Letter of attorney (signed by the insured person, the client)
 - _ A photocopy of the passport
-



Benefits for the insured person (the Client)

Risk Analysis

-
- _ Confidence in compliance with legal and fiscal issues
 - _ Alignment with the new regulatory framework (update procedure)
-

Maintenance and management

-
- _ Professional services
 - _ Professional services on the insurance matters
 - _ Control and audit of the changes/documentation
 - _ Management/storage of all documentation
 - _ The possibility of getting the consultant's services
 - _ Advising and providing alternative solutions
-

Legal support of insurance cases

-
- _ Insurance on survival or death
-

Determination of the content and the form of the contract

-
- _ Optimization or adjustment of provisions of the contract
 - _ The ability to improve tax exemptions
-

Disclaimer

_The documentation contained herein is intended exclusively for the recipient and may not be reproduced, forwarded or published either in electronic or another form. It is purely for your information and does not represent an offer, quotation or request for tender, a public advertisement or a recommendation for the sale or purchase of products.

The contents have been compiled by our employees and are based upon sources of information which we regard as reliable. However, we can not provide any guarantee for the correctness, comprehensiveness and timeliness of the aforementioned contents. We would in particular draw your attention to the fact that AM PLUS neither provides nor offers any form of legal or tax advice. AM PLUS thus cannot be held liable for any tax consequences that may arise from either the documentation or from the contract of insurance.

The circumstances and fundamentals which form the purpose for the information contained in this publication could change at any time. Information, once published, may not be understood as if the circumstances have not changed since the time of publication or that the information after publication is still up to date. The information contained in this publication do not represent decision guidance for economic, legal, fiscal or other matters of consultation, nor may any decisions be taken solely on the basis of this information. This publication is not intended for people under a legal jurisdiction which does not permit the distribution of this publication or where permission is required. Persons who come into the possession of this publication should therefore inform themselves about any applicable restrictions and comply with them.

The German version of this document is authoritative. Should differences in interpretation occur between this version and the original German version, the text of the German version takes precedence.