

Report Name	2026 Override Life
Primary Field	Carrier
Secondary Field	Override Life
Start Date	01/01/2026
End Date	08/31/2026
Properties	All Policies

Carrier	Client	Product	Agent	Policy Number	Add On	Effective Date	Term Date	Mode	State	01-26	02-26	03-26	04-26	05-26	06-26	07-26	08-26
Override Life	Carter, Michelle	Base	Break, Anita	INA087016		01/01/24		M	CA	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
Override Life	Carter, Michelle	HRA	Track base, Healthcare Assessment and override payments separately to ensure all payments are received.														
Override Life	Carter, Michelle	OVR								\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25
Override Life	Castro, Juan	Base															\$864.00
Override Life	Castro, Juan	HRA															\$75.00
Override Life	Castro, Juan	OVR	Break, Anita	INA088767	Other Comp	08/01/26		M									\$150.00
Override Life	Castro, Julie	Base	Break, Anita	INA087986		01/01/26		M		X							
Override Life	Castro, Julie	HRA	Break, Anita	INA087986	Other Comp	01/01/26		M		X							
Override Life	Castro, Julie	OVR	Break, Anita	INA087986	Other Comp	01/01/26		M		X							
Override Life	Clark, Gary	Base	Break, Anita	INA086793		01/01/25		M	CA	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
Override Life	Clark, Gary	HRA	Break, Anita	INA086793	Other Comp	01/01/25		M									
Override Life	Clark, Gary	OVR	Break, Anita	INA086793	Other Comp	01/01/25		M		\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25
Override Life	Gray, Thomas	Base	Break, Anita	INA089733		07/01/26		M								\$216.00	
Override Life	Gray, Thomas	HRA	Break, Anita	INA089733	Other Comp	07/01/26		M								X	
Override Life	Gray, Thomas	OVR	Break, Anita	INA089733	Other Comp	07/01/26		M								\$150.00	
Override Life	Guzman, James	Base	Break, Anita	INA086988		01/01/24		M	CA	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
Override Life	Guzman, James	HRA	Break, Anita	INA086988	Other Comp	01/01/24		M									
Override Life	Guzman, James	OVR	Break, Anita	INA086988	Other Comp	01/01/24		M		X	X	X	X	X	X	X	X
Override Life	Hall, Marilyn	Base	Break, Anita	INA087087		01/01/24		M	CA	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
Override Life	Hall, Marilyn	HRA	Break, Anita	INA087087	Other Comp	01/01/24		M									
Override Life	Hall, Marilyn	OVR	Break, Anita	INA087087	Other Comp	01/01/24		M		\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25
Override Life	McDonald, Brittany	Base	Break, Anita	INA087338		01/01/26		M	CA	\$432.00							
Override Life	McDonald, Brittany	HRA	Break, Anita	INA087338	Other Comp	01/01/26		M		\$75.00							
Override Life	McDonald, Brittany	OVR	Break, Anita	INA087338	Other Comp	01/01/26		M		\$150.00							
Override Life	Patel, Shirley	Base	Break, Anita	INA088185		06/01/26		M							\$864.00		
Override Life	Patel, Shirley	HRA	Break, Anita	INA088185	Other Comp	06/01/26		M							\$75.00		
Override Life	Patel, Shirley	OVR	Break, Anita	INA088185	Other Comp	06/01/26		M							X		
Override Life	Peterson, Nathan	Base	Break, Anita	INA089535		07/01/26		M								\$216.00	
Override Life	Peterson, Nathan	HRA	Break, Anita	INA089535	Other Comp	07/01/26		M								X	
Override Life	Peterson, Nathan	OVR	Break, Anita	INA089535	Other Comp	07/01/26		M								\$150.00	
Override Life	Ramirez, Theresa	Base	Break, Anita	INA088766		08/01/26		M									\$864.00
Override Life	Ramirez, Theresa	HRA	Break, Anita	INA088766	Other Comp	08/01/26		M									\$75.00
Override Life	Ramirez, Theresa	OVR	Break, Anita	INA088766	Other Comp	08/01/26		M									X
Override Life	Richardson, Stephanie	Base	Break, Anita	INA086953		01/01/24		M	CA	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
Override Life	Richardson, Stephanie	HRA	Break, Anita	INA086953	Other Comp	01/01/24		M									
Override Life	Richardson, Stephanie	OVR	Break, Anita	INA086953	Other Comp	01/01/24		M		\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25	\$6.25