



JPMorgan Chase Bank, N.A.  
 P O Box 182051  
 Columbus, OH 43218 - 2051

September 30, 2023 through October 31, 2023

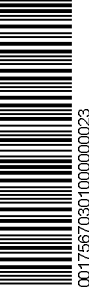
Account Number: **000000221750505**

**CUSTOMER SERVICE INFORMATION**

Web site: **Chase.com**  
 Service Center: **1-800-242-7338**  
 Para Espanol: **1-888-622-4273**  
 International Calls: **1-713-262-1679**  
 We accept operator relay calls

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INSURMAX LLC  
 5368 BROADWOOD AVE  
 PEACHTREE CORNERS GA 30092-1605



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**CHECKING SUMMARY**

Chase Business Complete Checking

	INSTANCES	AMOUNT
<b>Beginning Balance</b>		<b>\$101,533.05</b>
Deposits and Additions	42	38,238.68
Checks Paid	3	-10,427.67
ATM & Debit Card Withdrawals	1	-41.62
Electronic Withdrawals	15	-40,035.40
<b>Ending Balance</b>	<b>61</b>	<b>\$89,267.04</b>

Congratulations, we waived the \$15 Monthly Service Fee for this statement period, based on your qualifying activity.

**How to Avoid the Monthly Service Fee (MSF)**

If you meet any of the following qualifying activities for this Chase Business Complete Checking<sup>SM</sup> account in a statement period, we will waive the \$15 MSF.

Here's the business activity we used to determine if you qualified for the MSF waiver:

- \$2,000 Minimum Daily Ending Balance: Your lowest daily ending balance was \$78,105.81.
- \$2,000 Chase Payment Solutions<sup>SM</sup> Activity: \$0.00 was deposited into this account.
- \$2,000 Chase Ink<sup>®</sup> Business Card Activity: \$0.00 was your total Ink activity.

You can also avoid the MSF if you:

- Maintain a linked Chase Private Client Checking<sup>SM</sup> account OR
- Meet Chase Military Banking requirements

For complete details on all requirements to avoid the MSF, please review the Additional Banking Services and Fees for Business Accounts at [chase.com/business/disclosures](https://chase.com/business/disclosures) or visit a Chase branch.



September 30, 2023 through October 31, 2023

Account Number: 000000221750505

**DEPOSITS AND ADDITIONS**

DATE	DESCRIPTION	AMOUNT
10/02	Orig CO Name: Symetra Orig ID: 9910742142 Desc Date: CO Entry Descr: 94C Agaga Sec: PPD Trace#: 111000024367911 Eed: 231002 Ind ID: Name: Insurmax LLC Trn: 2754367911Tc	\$7.76
10/03	Orig CO Name: *Lincoln Nat Lif Orig ID: 350472300 Desc Date: CO Entry Descr: Eftpymnt Sec: CCD Trace#: 091000015186105 Eed: 231003 Ind ID: 00005755310 Ind Name: Insurmax 0155Crccdlnfull Trn: 2765186105Tc	407.24
10/03	Orig CO Name: Ameritas Life IN Orig ID: 2570098400 Desc Date: CO Entry Descr: Xp04ACH Sec: CCD Trace#: 042000010850428 Eed: 231003 Ind ID: Xp040000723955 Ind Name: Insurmax LLC Trans: 4225645 Trn: 2760850428Tc	116.99
10/03	Orig CO Name: North American L Orig ID: 1362428931 Desc Date: 231002 CO Entry Descr: Commissionsec: PPD Trace#: 091000015182004 Eed: 231003 Ind ID: Ind Name: Insurmax LLC Trn: 2765182004Tc	74.84
10/04	Orig CO Name: Allianz Life Ins Orig ID: 9411593863 Desc Date: 231003 CO Entry Descr: Commissionsec: PPD Trace#: 091000014516505 Eed: 231004 Ind ID: Ind Name: Insurmax LLC Trn: 2774516505Tc	3.79
10/05	Orig CO Name: Anthem 05B Orig ID: 4352145715 Desc Date: CO Entry Descr: Dms EFT Sec: CCD Trace#: 111000029167300 Eed: 231005 Ind ID: 3222536093 Ind Name: Insurmax LLC EDI Payment Trn: 2789167300Tc	129.76
10/06	Orig CO Name: Allianz Life Ins Orig ID: 9411593863 Desc Date: 231005 CO Entry Descr: Commissionsec: PPD Trace#: 091000017865382 Eed: 231006 Ind ID: Ind Name: Insurmax LLC Trn: 2797865382Tc	1,036.36
10/06	Orig CO Name: Humana Inc. Orig ID: 5391263473 Desc Date: 231004 CO Entry Descr: Agent Commsec: PPD Trace#: 083000051398447 Eed: 231006 Ind ID: Ind Name: Trn: 2791398447Tc	75.25
10/10	Orig CO Name: Alliant Health Orig ID: 2582335921 Desc Date: Oct 10 CO Entry Descr: Ahp Comm Sec: PPD Trace#: 082907273357760 Eed: 231010 Ind ID: Ind Name: Insurmax LLC Trn: 2833357760Tc	940.00
10/10	Orig CO Name: Aetna Life Ins. Orig ID: 8066033492 Desc Date: CO Entry Descr: Aetna-Premsec: PPD Trace#: 031100207688238 Eed: 231010 Ind ID: Ind Name: Insurmax LLC Trn: 2837688238Tc	258.92
10/10	Orig CO Name: Worldfinancialgr Orig ID: 1421518386 Desc Date: 231006 CO Entry Descr: Commissionsec: PPD Trace#: 022000048697469 Eed: 231010 Ind ID: Ind Name: Wang Max Zi Trn: 2838697469Tc	26.14
10/10	Orig CO Name: Allianz Life Ins Orig ID: 9411593863 Desc Date: 231006 CO Entry Descr: Commissionsec: PPD Trace#: 091000010720620 Eed: 231010 Ind ID: Ind Name: Insurmax LLC Trn: 2830720620Tc	16.43
10/10	Orig CO Name: Symetra Orig ID: 9910742142 Desc Date: CO Entry Descr: 94C Agaga Sec: PPD Trace#: 111000027225095 Eed: 231010 Ind ID: Name: Insurmax LLC Trn: 2837225095Tc	8.97
10/11	Orig CO Name: Centene Manageme Orig ID: 9000004108 Desc Date: CO Entry Descr: Hcclaimpmtsec: CCD Trace#: 081000607973051 Eed: 231011 Ind ID: 123071675 Ind Name: Insurmax LLC Trn*1*081000606441836*1391864073\ Trn: 2847973051Tc	22,222.00
10/11	Orig CO Name: *Lincoln Nat Lif Orig ID: 350472300 Desc Date: CO Entry Descr: Eftpymnt Sec: CCD Trace#: 091000010407112 Eed: 231011 Ind ID: 00005755310 Ind Name: Insurmax 0155Crccdlnfull Trn: 2840407112Tc	187.25
10/11	Orig CO Name: Ameritas Life IN Orig ID: 2570098400 Desc Date: CO Entry Descr: Xp04ACH Sec: CCD Trace#: 042000014329427 Eed: 231011 Ind ID: Xp040000727173 Ind Name: Insurmax LLC Trans: 4225645 Trn: 2844329427Tc	155.04
10/11	Orig CO Name: Allied National Orig ID: 2431625751 Desc Date: 231011 CO Entry Descr: ACH: Producers: PPD Trace#: 081006167937231 Eed: 231011 Ind ID: Ind Name: Insurmax LLC Trn: 2847937231Tc	84.14
10/11	Orig CO Name: Mwgcommissionpmt Orig ID: 1640838838 Desc Date: 231011 CO Entry Descr: Mwgcommmpmtsec: CCD Trace#: 065300275449712 Eed: 231011 Ind ID: 6De94Ecf3469 Ind Name: Insurmax, LLC Mwg Commission Pmt Trn: 2845449712Tc	37.36

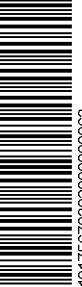


September 30, 2023 through October 31, 2023

Account Number: 00000221750505

**DEPOSITS AND ADDITIONS** (continued)

DATE	DESCRIPTION	AMOUNT
10/12	Orig CO Name:Cigna Healthcare Orig ID:7025286506 Desc Date:101023 CO Entry Descr:Cigna Commsec:CCD Trace#:242071752402216 Eed:231012 Ind ID:514419 Ind Name:Insurmax LLC Trn: 2852402216Tc	8,816.00
10/13	Orig CO Name:Humana Inc. Orig ID:5391263473 Desc Date:231012 CO Entry Descr:Agent Commsec:PPD Trace#:083000054986424 Eed:231013 Ind ID: Ind Name: Trn: 2864986424Tc	14.43
10/17	Orig CO Name:*Lincoln Nat Lif Orig ID:350472300 Desc Date: CO Entry Descr:Eftpymnt Sec:CCD Trace#:091000011599355 Eed:231017 Ind ID:00005755310 Ind Name:Insurmax 0155Crccdlnfull Trn: 2901599355Tc	614.11
10/17	Orig CO Name:Ameritas Life IN Orig ID:2570098400 Desc Date: CO Entry Descr:Xp04ACH Sec:CCD Trace#:042000015070525 Eed:231017 Ind ID:Xp040000730193 Ind Name:Insurmax LLC Trans: 4225645 Trn: 2905070525Tc	147.28
10/17	Orig CO Name:Assurity Life Orig ID:3381843471 Desc Date:231014 CO Entry Descr:Ddp Creditsec:PPD Trace#:042000015070443 Eed:231017 Ind ID: Ind Name:Insurmax LLC Trn: 2905070443Tc	11.02
10/18	Orig CO Name:Allied National Orig ID:2431625751 Desc Date:231018 CO Entry Descr:ACH: Producers:PPD Trace#:081006160875334 Eed:231018 Ind ID: Ind Name:Insurmax LLC Trn: 2910875334Tc	343.81
10/20	Orig CO Name:Humana Inc. Orig ID:5391263473 Desc Date:231019 CO Entry Descr:Agent Commsec:PPD Trace#:083000053080823 Eed:231020 Ind ID: Ind Name: Trn: 2933080823Tc	375.70
10/20	Orig CO Name:Mulberrymanageme Orig ID:9000020286 Desc Date:231020 CO Entry Descr:Credit Sec:CCD Trace#:122043480791130 Eed:231020 Ind ID:107782916 Ind Name:Max Wang 6464033677 Trn: 2930791130Tc	200.00
10/20	Orig CO Name:Mulberrymanageme Orig ID:9000020286 Desc Date:231020 CO Entry Descr:Credit Sec:CCD Trace#:122043480791132 Eed:231020 Ind ID:107783287 Ind Name:Insurmax LLC 6464033677 Trn: 2930791132Tc	75.00
10/20	Orig CO Name:3Cignaoscar Bro Orig ID:9000020380 Desc Date:231020 CO Entry Descr:Credit Sec:CCD Trace#:122043480790963 Eed:231020 Ind ID:107789255 Ind Name:Insurmax LLC 8009971654 Trn: 2930790963Tc	5.00
10/23	Orig CO Name:Kp Financial Svc Orig ID:1941340523 Desc Date: CO Entry Descr:ACH Sec:CCD Trace#:031100207170818 Eed:231023 Ind ID:Ap0000824242 Ind Name:Insurmax LLC GA20231019124057562-Brijv Trn: 2967170818Tc	2,375.00
10/23	Orig CO Name:Worldfinancialgr Orig ID:1421518386 Desc Date:231020 CO Entry Descr:Commissionsec:PPD Trace#:022000044836542 Eed:231023 Ind ID: Ind Name:Wang Max Zi Trn: 2964836542Tc	26.28
10/23	Orig CO Name:Symetra Orig ID:9910742142 Desc Date: CO Entry Descr:94C Agaga Sec:PPD Trace#:111000022383425 Eed:231023 Ind ID: Ind Name:Insurmax LLC Trn: 2962383425Tc	2.58
10/24	Orig CO Name:*Lincoln Nat Lif Orig ID:350472300 Desc Date: CO Entry Descr:Eftpymnt Sec:CCD Trace#:091000012174604 Eed:231024 Ind ID:00005755310 Ind Name:Insurmax 0155Crccdlnfull Trn: 2972174604Tc	736.60
10/24	Orig CO Name:Ameritas Life IN Orig ID:2570098400 Desc Date: CO Entry Descr:Xp04ACH Sec:CCD Trace#:042000017450340 Eed:231024 Ind ID:Xp040000731978 Ind Name:Insurmax LLC Trans: 4225645 Trn: 2977450340Tc	34.45
10/25	Remote Online Deposit 1	40.00
10/25	Orig CO Name:Allied National Orig ID:2431625751 Desc Date:231025 CO Entry Descr:ACH: Producers:PPD Trace#:081006162209093 Eed:231025 Ind ID: Ind Name:Insurmax LLC Trn: 2982209093Tc	93.08
10/26	Orig CO Name:Cigna Healthcare Orig ID:7025286506 Desc Date:102423 CO Entry Descr:Cigna Commsec:CCD Trace#:242071759936445 Eed:231026 Ind ID:514419 Ind Name:Insurmax LLC Trn: 2999936445Tc	351.00



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September 30, 2023 through October 31, 2023

Account Number: **000000221750505****DEPOSITS AND ADDITIONS** (continued)

DATE	DESCRIPTION	AMOUNT
10/30	Orig CO Name: Symetra Orig ID: 9910742142 Desc Date: CO Entry Desc: 94C Agaga Sec: PPD Trace#: 111000025436397 Eed: 231030 Ind ID: Name: Insurmax LLC Trn: 3035436397Tc	5.69
10/30	Orig CO Name: Allianz Life Ins Orig ID: 9411593863 Desc Date: 231027 CO Entry Desc: Commissionsec: PPD Trace#: 091000010609757 Eed: 231030 Ind ID: Ind Name: Insurmax LLC Trn: 3030609757Tc	2.75
10/31	Orig CO Name: Ameritas Life IN Orig ID: 2570098400 Desc Date: CO Entry Desc: Xp04ACH Sec: CCD Trace#: 042000010084727 Eed: 231031 Ind ID: Xp040000733414 Ind Name: Insurmax LLC Trans: 4225645 Trn: 3040084727Tc	85.61
10/31	Orig CO Name: North American L Orig ID: 1362428931 Desc Date: 231030 CO Entry Desc: Commissionsec: PPD Trace#: 091000017184571 Eed: 231031 Ind ID: Ind Name: Insurmax LLC Trn: 3047184571Tc	67.84
10/31	Orig CO Name: Uhic Sec Hoz Orig ID: 1362739571 Desc Date: CO Entry Desc: Uhic Sec: CCD Trace#: 043000097291340 Eed: 231031 Ind ID: 672775 Ind Name: Max Wang Trn: 3047291340Tc	20.00
10/31	Orig CO Name: *Lincoln Nat Lif Orig ID: 350472300 Desc Date: CO Entry Desc: Eftpymnt Sec: CCD Trace#: 091000017467060 Eed: 231031 Ind ID: 00005755310 Ind Name: Insurmax 0155Crccdlnfull Trn: 3047467060Tc	7.21
<b>Total Deposits and Additions</b>		<b>\$38,238.68</b>

**CHECKS PAID**

CHECK NO.	DESCRIPTION	DATE PAID	AMOUNT
1177 ^	10/02	10/02	\$3,915.21
1178 ^		10/02	2,500.00
1179 ^	10/11	10/11	4,012.46
<b>Total Checks Paid</b>			<b>\$10,427.67</b>

If you see a description in the Checks Paid section, it means that we received only electronic information about the check, not the original or an image of the check. As a result, we're not able to return the check to you or show you an image.

^ An image of this check may be available for you to view on Chase.com.

**ATM & DEBIT CARD WITHDRAWALS**

DATE	DESCRIPTION	AMOUNT
10/17	Card Purchase 10/16 Oscar Health Plan of 646-406-3677 NY Card 2129	\$41.62
<b>Total ATM &amp; Debit Card Withdrawals</b>		<b>\$41.62</b>

**ATM & DEBIT CARD SUMMARY**

Max Zi Wang Card 2129

Total ATM Withdrawals & Debits	\$0.00
Total Card Purchases	\$41.62
Total Card Deposits & Credits	\$0.00

ATM &amp; Debit Card Totals

Total ATM Withdrawals & Debits	\$0.00
Total Card Purchases	\$41.62
Total Card Deposits & Credits	\$0.00

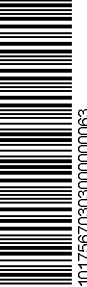


September 30, 2023 through October 31, 2023

Account Number: 000000221750505

**ELECTRONIC WITHDRAWALS**

DATE	DESCRIPTION	AMOUNT
10/02	10/02 Payment To Chase Card Ending IN 9715	\$550.76
10/05	10/05 Payment To Chase Card Ending IN 9993	3,739.18
10/05	Orig CO Name: American Express Orig ID: 2005032111 Desc Date: 231005 CO Entry Descr: ACH Pmt Sec: CCD Trace#: 021000025184737 Eed: 231005 Ind ID: W5588 Ind Name: Max Wang Er Am Trn: 2785184737Tc	1,778.38
10/10	10/08 Payment To Chase Card Ending IN 4902	10,655.45
10/10	Orig CO Name: American Express Orig ID: 2005032111 Desc Date: 231010 CO Entry Descr: ACH Pmt Sec: CCD Trace#: 021000020445716 Eed: 231010 Ind ID: W9020 Ind Name: Max Wang Er Am Trn: 2830445716Tc	2,290.71
10/10	Zelle Payment To Thuc Tran Jpm99A3Cwx38	1,100.00
10/11	Orig CO Name: GA Dept of Labor Orig ID: 0586002009 Desc Date: 231006 CO Entry Descr: Ui Tax Pmtsec: Web Trace#: 061113417673057 Eed: 231011 Ind ID: 005734268 Ind Name: Insurmax LLC Trn: 2847673057Tc	2.70
10/13	Orig CO Name: Irs Orig ID: 3387702000 Desc Date: 101323 CO Entry Descr: Usataxyymtsec: CCD Trace#: 061036011433471 Eed: 231013 Ind ID: 270368635367699 Ind Name: Insurmax LLC Trn: 2861433471Tc	1,220.04
10/13	Orig CO Name: Georgia Its Tax Orig ID: 2586002015 Desc Date: 231012 CO Entry Descr: GA TX Pymtsec: CCD Trace#: 091000011777939 Eed: 231013 Ind ID: 1977160848 Ind Name: Insurmax LLC Georgia Its Tax Trn: 2861777939Tc	572.25
10/17	Orig CO Name: American Express Orig ID: 2005032111 Desc Date: 231017 CO Entry Descr: ACH Pmt Sec: CCD Trace#: 021000020632460 Eed: 231017 Ind ID: W6686 Ind Name: Max Wang Er Am Trn: 2900632460Tc	9,723.88
10/17	Orig CO Name: American Express Orig ID: 2005032111 Desc Date: 231017 CO Entry Descr: ACH Pmt Sec: CCD Trace#: 021000020632576 Eed: 231017 Ind ID: W8738 Ind Name: Max Wang Er Am Trn: 2900632576Tc	3,911.66
10/17	Orig CO Name: American Express Orig ID: 2005032111 Desc Date: 231017 CO Entry Descr: ACH Pmt Sec: CCD Trace#: 021000020632529 Eed: 231017 Ind ID: W5880 Ind Name: Max Wang Er Am Trn: 2900632529Tc	2,220.99
10/18	10/18 Payment To Chase Card Ending IN 9715	1,174.40
10/27	Orig CO Name: Citi Card Online Orig ID: Citictp Desc Date: 231026 CO Entry Descr: Payment Sec: Web Trace#: 091409689360891 Eed: 231027 Ind ID: 431205980655389 Ind Name: Kim Nuong T Nguyen Trn: 3009360891Tc	95.00
10/31	Zelle Payment To Uyen Nguyen 18875243719	1,000.00
<b>Total Electronic Withdrawals</b>		<b>\$40,035.40</b>



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**DAILY ENDING BALANCE**

DATE	AMOUNT	DATE	AMOUNT	DATE	AMOUNT
10/02	\$94,574.84	10/12	103,592.44	10/24	89,688.86
10/03	95,173.91	10/13	101,814.58	10/25	89,821.94
10/04	95,177.70	10/17	86,688.84	10/26	90,172.94
10/05	89,789.90	10/18	85,858.25	10/27	90,077.94
10/06	90,901.51	10/20	86,513.95	10/30	90,086.38
10/10	78,105.81	10/23	88,917.81	10/31	89,267.04
10/11	96,776.44				



September 30, 2023 through October 31, 2023

Account Number: **00000221750505**

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**IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:**

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

**For personal accounts only:** We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

**For business accounts,** see your deposit account agreement or other applicable agreements that govern your account for details.

**IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS:** Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

**JPMorgan Chase Bank, N.A. Member FDIC**

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