



PENTOR Charity Services

Loeys-Dietz Syndrome Foundation of Canada (LDSFC)
has partnered with PENTOR Charity Services (PCS) to assist
LDSF Canada (www.loeysdietzcanada.org) to develop a
Planned Giving Plus Program to finance medical research and support.

PENTOR Charity Services (PCS) has developed the
following streamlined process to evaluate potential life insurance donations.

PROCESS

- 1) Submit case with the following info to donation@pentor.com
 - a. Carrier name
 - b. Policy type (term - permanent - universal)
 - c. Policy contract number
 - d. Face value
 - e. Policy issue date
 - f. Policy expiry date
 - g. Premiums and frequency
 - h. Policy trigger (if multiple insureds: first/last to die)
 - i. Age and DOB
 - j. Any known medical issues
 - k. Insured contact information
 - i. Full name
 - ii. Phone number
 - iii. Email address
- 2) PCS will review case and indicate interest to advisor
- 3) If potential donation meets criteria, PCS will setup medical underwriting call with the insured
- 4) Medical underwriting phone interview (Costs assumed by LDSFC)
- 5) Within 2 weeks of the call, LDSFC will indicate interest
- 6) LDSFC will provide an approximate value of donation receipt
- 7) Client confirms intention to donate
- 8) LDSFC contracts the actuary to generate the value for the donation receipt (Costs assumed by LDSFC)
- 9) Transfer of ownership and advisor completes paperwork accordingly
- 10) Insurance company confirms transfer of ownership to Foundation
- 11) LDSFC issues tax receipt and thank you letter to donor
- 12) Once transfer is confirmed by Carrier, LDSFC converts policy to permanent (if term)

Contact us at:

donation@pentor.com | 1 (800) 604-3685