Contact us at:

[donation@pentor.com](mailto:donation@pentor.com) |1 (800) 604-3685

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

**Loeys-Dietz Syndrome Foundation of Canada (LDSFC)**

has partnered with PENTOR Charity Services (PCS) to assist

**LDSF Canada** ([www.loeysdietzcanada.org](http://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.