

The Breus Group, LLC

**Alan Breus, CLU, ChFC,
Qualified Member: Appraisers Association of America**

**Appraisal of Non-Cash Charitable Contribution
Life Insurance & Annuity Policies**

Please provide the following information and paperwork for the qualified appraisal requested. The processing of the request will be timely (approximately 5 to 6 business days) with the appraisal and completed and signed Form 8283 sent to the requesting party.

Donor's:

Name _____

Mailing Address _____

Phone Number _____ E-Mail Address _____

Social Security or Tax ID # _____

Charity's:

Name _____

Address _____

PhoneNumber _____ Contact _____

Insurance Contract Information Required:

From Policy:

- Specification or summary PageUsually Page 1 or 2
- Policy Data PageUsually Page 2 or 3
- Table of Premiums Page (Term Insurance).....Usually Page 4
- Table of Cash Values (Ordinary Life or Universal Life).....Usually Page 4
- Beneficiary Designations.....Part of the Original Application attached to policy proper
- Statement of Beneficiary and Ownership Transfer to the charity
- Rights of conversion and/or exchange.....In the body of the policy

From Insurance Company:

- Owner/Donor's Adjusted Cost Basis (please use sample request letter provided)
- Current Policy Status (Including Values) Derived from the most current policy statement or in-force illustration prepared by the Insurance Company (as per the sample request letter).

Please send this cover sheet and your check for \$300.00 (volume discount is available) to:

**The Breus Group
144 South 3rd Street, #104
San Jose, CA 95112**

Voice: 408-297-6302 Fax: 408-297-6303

Web Address: www.thebreusgroup.com

E-Mail: alanb@thebreusgroup.com