

The Breus Group, LLC

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

Appraisal of Non-Cash Charitable Contribution Life Insurance & Life Settlement Contracts

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 # _____

Donee's:

Name _____

Address _____

PhoneNumber _____ Contact _____

Insurance Contract Information Required:

From Policy:

Specification or summary Page	Usually Page 1 or 2
Policy Data Page	Usually 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).
Form 712 prepared consistent with date of transfer.

Life Insurance please send this cover sheet, information and your check for \$400.00 (volume discount is available)

Life Settlement please send cover sheet and information for fee determination

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