

Sample Letter to Insurance Company:

On Charitable Organizations Letter Head as Owner

January 1, 20__

Insurance Company
Address
Address

RE; Policy Number – OOOOOOOOOOOO

ATTN: Customer Service

As of (00/00/0000.) the above referenced Life Insurance policy was gifted to us at ABCD University and we request that you send, for this policy only, to our office and to our representative, Alan Breus, CLU, ChFC, the following items so that we may complete the required tax forms.

- A statement of the prior donor's adjusted cost basis as of the date of the gift, 00/00/0000
- A completed Part II of Form 712 as of the date of the gift
- Please prepare and send a current in-force illustration and include the anticipated period of time that the policy will remain in-force with no further premium payments.
- A history of all/any ownership and beneficiary changes relating to this policy.
- A history of payments (please note if APL or cash from insured or owner)

Thank you in advance for your help in this matter. Addresses for mailing are below.

Sincerely,

Planned Giving Officer
ABCD University
Address
Address

Alan Breus, CLU, ChFC
144 S. 3rd Street, #104
San Jose, CA 95112