



How the Donation Process Works

1. We promote the program to our mid-level donors, and direct interested donors to the program administrator, LifeHelp, for specific coverage costs, terms and other information.
2. LifeHelp works with our interested donors to find coverage and complete an application by phone and mail, with online support.
3. LifeHelp obtains our and the donor's signatures on the application, then forwards it to the insurance company for underwriting.
4. When the application is approved, policy documents and delivery documents are forwarded.
5. At the same time, the insurance company notifies our donor to give us the agreed upon tax deductible pledge to cover the premium.
6. We receive the donation and use it to make the premium payment.
7. The coverage goes in force, and our organization is set to receive a sizeable, *guaranteed* gift.

"Legacy Life Giving offers a tremendous opportunity for our long time supporters/donors ... It gives our donors a way to leverage their donation by purchasing a life insurance policy that fits their budget and in return gives ... a guaranteed endowment gift."

*Lori Willis, Director of Advancement
Bishop Garcia Diego High School*

Experienced, Professional Program Support

- Legacy Life is brought to us and our donors through LifeHelp, an insurance administrator with nearly 40 years experience helping middle-income Americans better protect their families' financial futures.
- LifeHelp's highly professional, licensed agents handle our donors' inquiries and help guide them through the process from start to finish – courteously, and never with any pressure.
- We receive ongoing tracking and reporting of all policies and their valuations.
- Insurance products are underwritten by top-notch companies with a long history of meeting their claims obligations. All carriers rated A- (Excellent) or better by A.M. Best.

Our Role

Simply put, the best program in the world won't succeed if our donors don't know about it. The success of our Legacy Life program will be directly proportional to our efforts to actively and enthusiastically promote it to our mid-level donors.

To help us do that as cost effectively as possible, Legacy Life will provide information we will use in member communications to help generate awareness. Your help is critical. Be sure to let our current and prospective mid-level donor contacts know about this superior alternative to a bequest.