

# Managing Donated Life Insurance CD-ROM



## An affordable yet invaluable resource

Now a system for monitoring and managing the life insurance policies that have been donated to your organization. Without attentive monitoring, donated policies can quickly lose value. This easy-to-follow system allows you to avoid the most common problems that drain value from donated life insurance.

This easy-to-use CD-ROM disk contains:

- ◆ **Life Insurance Acceptance and Management Policy** — full instructions on what accept and how to manage it.
- ◆ **Policy Acceptance Checklist** — Helps you review each policy *before* accepting it
- ◆ **Disclosure Statement** — for donors
- ◆ **Donor Premium Pledge Form**
- ◆ **Guidelines for Agents** — so they design policies that are suitable for charitable purposes
- ◆ **Life Insurance Spreadsheet** — a comprehensive tool for monitoring the health of your policies
- ◆ **Letter Library** — templates for all of the letters you need for donors and insurance companies
- ◆ **System Tutorial** — shows you exactly how to use this system *plus additional resource materials*.

**ORDER TODAY**

**\$ 79.00**

**Shipping & Postage Included**

*This CD-ROM requires an internet browser (like Internet Explorer), MS-Word and MS-Excel. This material is copyrighted and licensed only to the user. It may not be distributed to other organizations.*

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