

# Charity – Alumni & Donor Insurance Program

*Designed for Donors that wish to benefit the Grossman Burn Foundation today and in the future without any “out-of-pocket” expenses)*

## Donor Candidates

- Insurable males and females ages 40 through 85
- Must have available insurance capacity and qualify for life insurance coverage.
- Net-worth in Excess of \$1,500,000 (at least \$1,000,000 in addition to primary residence)

## Ownership Structure

**An Irrevocable Charitable Life Insurance Trust will be the Owner of the policy.**

**The Grossman Burn Foundation is the sole beneficiary.**

## Why Synergy Financial Services?

- 3-types of programs
  1. “Pledged Collateral” lending (ages 40 – 90)
  2. “Signature Only” lending (65 – 84)
  3. Partial “Asset Assignment” lending (70 – 84)
- 40 plus institutional lenders
- 30 national insurance carriers

Take a moment to call Synergy Financial and see if you can benefit the Grossman Burn Foundation with a donation of your unused life insurance.

**CALL SYNERGY DIRECT AT: (818) 221-0010**

**California: #OC73327 – Minnesota: #40055695 – Delaware: #9000413**

**Florida: #P109812 – North Carolina: #3194 – Pennsylvania: #479914 – South Dakota: #6363788**

**Nevada: #519656 - Kentucky: #51590694 – Idaho: #AL146680 – Arizona: #903420 – Texas: #1449563**

**New Jersey: #1092452 – Illinois: #603194 - New York: #LB1047692 - Connecticut: #2286573**

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