



Referring Policies to Canadian Life Settlements

STEP 1

- Is it a permanent or convertible policy issued by a Canadian life insurance company?
- Is the insured / co-insured age 70+ or with life-shortening medical problems?
- Is the death benefit of the policy or combined policies \$100,000 or greater?
- No need to do any LE calculations! Canadian Life Settlements performs all Canadian LE determinations internally.

STEP 2

- Visit www.canadianlifeselements.com
- Click "Apply For Policy Valuation"
- Complete Steps 1 and 2
- Email info@canadianlifeselements.com with your information and the name of the case you referred. *

STEP 3

- Within 48 hours, Canadian Life Settlements will follow up with the insured (or their Power of Attorney)
- If acceptable, Canadian Life Settlements will request a completed Application and Physician Information Form
- Within 10 days of receipt of the Application, an Offer Letter will be sent, and copied to your company

STEP 4

- Get paid! 1% of the face value of the life settlement is paid confidentially to your company if all conditions are met

** Referring Agent information is for internal purposes only and will not be disclosed to insurance companies or other parties without your explicit authorization.*