

# STATEMENT OF FUNERAL GOODS AND SERVICES SELECTED

## Section I — Services

Package Plan Option \$ \_\_\_\_\_

See full description on attachment (Reference General Price list)

### Itemized Services

Arrangements and Professional Staff Services \$ \_\_\_\_\_

Transfer of Deceased to Funeral Home

\_\_\_\_\_ miles @ \$ \_\_\_\_\_ per mile \$ \_\_\_\_\_

Embalming/Refrigeration \$ \_\_\_\_\_

If you have selected a funeral that may require embalming, such as a funeral with viewing, you may have to pay for embalming. You do not have to pay for embalming you did not approve if you selected arrangements such as a direct cremation or immediate burial. If we charge for embalming, we will explain why below:

Other Preparation \$ \_\_\_\_\_

Visitation \_\_\_\_\_ days @ \$ \_\_\_\_\_ per day \$ \_\_\_\_\_

Funeral/Memorial Service \$ \_\_\_\_\_

Evening Service \$ \_\_\_\_\_

Family car no. \_\_\_\_\_ @ \$ \_\_\_\_\_ each \$ \_\_\_\_\_

Funeral Coach \$ \_\_\_\_\_

Utility Vehicles \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL SERVICES** \$

## Section II— Merchandise

Disposition ☐ Burial ☐ Cremation ☐ Other

Casket \$

Manufacturer \_\_\_\_\_

Name \_\_\_\_\_

Interior fabric and color \_\_\_\_\_

Exterior color \_\_\_\_\_

Construction and type \_\_\_\_\_

Model number \_\_\_\_\_

**Outer Burial Container** \$

Manufacturer \_\_\_\_\_

Description \_\_\_\_\_

Construction \_\_\_\_\_

Model number \_\_\_\_\_

### Guaranteed Merchandise

Shipping Container \_\_\_\_\_ \$ \_\_\_\_\_

Alternative Container \_\_\_\_\_ \$ \_\_\_\_\_

Urn \_\_\_\_\_ \$ \_\_\_\_\_

Marker \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL MERCHANDISE** \$

**TOTAL GUARANTEED FUNERAL PRICE** \$

If any legal, cemetery or other requirement has mandated the purchase of any of the items listed above, the law or requirement is listed below:

## NON-GUARANTEED CASH ADVANCE ITEMS

**YOU, THE PURCHASER, WILL HAVE TO PAY, AT THE TIME OF NEED, ANY ADDITIONAL CHARGES RESULTING FROM PRICE INCREASES FOR THE FOLLOWING PREARRANGED SERVICES AND COMMODITIES:**

Memorial package \$ \_\_\_\_\_

Obituary notices \$ \_\_\_\_\_

Death certificates \_\_\_\_\_ @ \$ \_\_\_\_\_ each \$ \_\_\_\_\_

Flowers \$ \_\_\_\_\_

Clergy honorarium \$ \_\_\_\_\_

Musician \_\_\_\_\_ \$ \_\_\_\_\_

Vocalist \_\_\_\_\_ \$ \_\_\_\_\_

Grave opening and closing \$ \_\_\_\_\_

Sales tax \_\_\_\_\_ % \$ \_\_\_\_\_

Disposition Permit \$ \_\_\_\_\_

Funeral Reception \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL NON-GUARANTEED CASH ADVANCE ITEMS** \$

**TOTAL GUARANTEED AND NON-GUARANTEED ITEMS** \$

Funeral Firm Name \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Funeral Firm Representative \_\_\_\_\_

Contract Beneficiary's (Insured's) Signature \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Insured's Printed Name \_\_\_\_\_

**This Agreement is funded by insurance:** You, the Purchaser, may cancel this Statement of Funeral Goods and Services Selected, without any penalty or obligation, within three (3) business days from the date of this Agreement.

For more information on funeral, cemetery and cremation matters, contact: Department of Consumer Affairs, Cemetery and Funeral Bureau, 1625 N. Market Blvd., Ste. S-208, Sacramento, CA 95834, Telephone (916) 574-7870 or toll free 1-800-952-5210.

## **BINDING CONTRACT**

This offer becomes a binding agreement when the provisions herein described are accepted by and executed by the Funeral Home. To provide funding for comparable funeral merchandise and services to those described in the Statement of Funeral Goods and Services Selected, the Insured has purchased a certificate of life insurance or annuity contract from GREAT WESTERN INSURANCE COMPANY, and offers to make Funeral Home the beneficiary thereof. In consideration for designating Funeral Home the beneficiary of the said certificate/contract, Funeral Home agrees to accept the proceeds of said certificate/contract as full payment for comparable merchandise and services at any future date, regardless of any price increases.

## **EXCESS CERTIFICATE PROCEEDS**

Upon death of the Insured, any accumulations of the certificate/contract in excess of the then current charges for comparable merchandise and services selected by my family will be the property of my estate.

## **EXPENDITURES EXCEEDING CERTIFICATE PROCEEDS**

In the event my family selects either higher quality merchandise or services with a cost greater than those described in the Statement of Funeral Good and Services Selected, the additional cost will be paid by my family.

## **COMMITMENT OF THE INSURED**

Insured agrees to keep the certificate/contract in full force, allowing all interest and dividends to accumulate. Insured will not borrow against the proceeds of the certificate. The Insured understands that all increases in death benefits from dividends are assigned to the Funeral Home. Should the certificate/contract become unenforceable for any reason or the death benefits are paid under the suicide clause, this agreement will become null and void.

## **LIMITATION ON PERFORMANCE AND PRICE GUARANTEE**

If the Insured dies by other than accidental means during the first two certificate years, either the family or the estate must pay the difference between the total of this contract and the premiums paid. That amount and the certificate/contract proceeds will be applied to the at-need statement of funeral goods and services selected. Any excess funds will be returned to the family.

## **IRREVOCABLE ASSIGNMENT OF BENEFITS**

The irrevocable assignment transfers the future proceeds of the certificate/contract to the designated funeral establishment, as their interest may appear, and is consideration for this Statement of Funeral Goods and Services Selected. If the insured applies for, or is the recipient of, any public assistance programs in the future, the irrevocable assignment of the certificate/contract may exempt the proceeds from being included in any evaluation of assets and qualification for assistance. The assignment cannot be revoked and the certificate/contract owner retains all other incidents of ownership. Refer to the certificate/contract for other limitations and restrictions.

## **CHANGE OF INSURED'S ADDRESS**

In the event the Insured's permanent residence is moved to a location outside the area normally serviced by Funeral Home, and Insured elects not to return to the said service area for either funeral services or burial, the proceeds of the certificate/contract will be paid to the designated beneficiary, contingent beneficiary or to the Insured's estate. If an Irrevocable Assignment of Benefits has been executed, the Funeral Home agrees to release the proceeds of said certificate/contract to the provider of the funeral services and merchandise.

## **CANCELLATION**

The Statement of Funeral Goods and Services Selected may be canceled at any time. Canceling this Agreement does not cancel your GREAT WESTERN INSURANCE COMPANY certificate/contract. The Purchaser may cancel his or her insurance under the terms and conditions outlined in the insurance documents. The Purchaser will receive the cash value if the certificate/contract is canceled 31 days or more after the issue date. The cash value may be considerably less than the premiums actually paid in.

## **DISCLOSURE**

By completing this form and by signing the GREAT WESTERN INSURANCE COMPANY application form, you acknowledge that: you were shown current General, Casket, and Outer Burial Container price lists prior to discussing those prices, services, or merchandise; you have read this Statement of Funeral Goods and Services Selected; you have received a copy of this document; and you understand that the person presenting this document is a representative of the funeral firm and an agent of GREAT WESTERN INSURANCE COMPANY to whom commissions may be paid. For more information on funeral, cemetery and cremation matters, contact: Department of Consumer Affairs, Cemetery and Funeral Bureau, 1625 N. Market Blvd, Ste. S-208, Sacramento, CA 95834, Telephone (916) 574-7870 or toll free 1-800-952-5210.