

**STATEMENT OF FUNERAL GOODS AND SERVICES SELECTED** | Great Western Insurance Company

Great Western Insurance Company is regulated by the Illinois Department of Insurance

No. \_\_\_\_\_

**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 \$ \_\_\_\_\_

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 arrangement such as a direct cremation or immediate burial. If we charge for embalming, we will explain why below:

Embalming \$ \_\_\_\_\_  
Other Preparation \$ \_\_\_\_\_  
Visitation \_\_\_\_\_ days @ \$ \_\_\_\_\_ per day \$ \_\_\_\_\_  
Funeral/Memorial Service \$ \_\_\_\_\_  
Family car no. \_\_\_\_\_ @ \$ \_\_\_\_\_ each \$ \_\_\_\_\_  
Funeral Coach \$ \_\_\_\_\_  
Utility Vehicle \$ \_\_\_\_\_  
Shipping Container \$ \_\_\_\_\_  
Memorial Package \$ \_\_\_\_\_  
Other facilities, services, and equipment Please specify \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
**TOTAL SERVICES** \$ \_\_\_\_\_

**Section I I— Merchandise**

Disposition  Burial  Cremation  Other  
Casket  None \$ \_\_\_\_\_  
 Manufacturer \_\_\_\_\_

Name \_\_\_\_\_  
Interior fabric and color \_\_\_\_\_  
Exterior color \_\_\_\_\_  
Model number \_\_\_\_\_  
Construction and type \_\_\_\_\_

**Cremation Container** \$ \_\_\_\_\_

Urn \_\_\_\_\_

**Outer Burial Container** \$ \_\_\_\_\_

Manufacturer \_\_\_\_\_  
Description \_\_\_\_\_  
Model number \_\_\_\_\_  
Construction \_\_\_\_\_

**Other Guaranteed Merchandise – Please specify**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TOTAL GUARANTEED FUNERAL PRICE (SECTIONS I + II)** \$ \_\_\_\_\_

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**

Escort \$ \_\_\_\_\_ Grave opening and closing \$ \_\_\_\_\_  
Obituary notices \$ \_\_\_\_\_ Sales tax \$ \_\_\_\_\_  
Death certificates \$ \_\_\_\_\_ Other \_\_\_\_\_ \$ \_\_\_\_\_  
Flowers \$ \_\_\_\_\_  
Clergy honorarium \$ \_\_\_\_\_  
Music \$ \_\_\_\_\_

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

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

**CONTRACT TERMS REVIEW**

The seller, listed below, has explained the terms of this contract to me and provided me with a copy of the Illinois Consumers Guide to Preneed Funeral and Burial Purchases. *Purchaser Please Initial* \_\_\_\_\_

I  Revocably  Irrevocably assign the policy used to fund this Agreement

**PROVIDER**

Funeral Firm Name \_\_\_\_\_ Signature \_\_\_\_\_  
Address \_\_\_\_\_ Branch \_\_\_\_\_  
Phone \_\_\_\_\_ Date \_\_\_\_\_

**SELLER (if other than Provider)**

Name \_\_\_\_\_  
Address \_\_\_\_\_  
Agent's Signature \_\_\_\_\_

**PARENT COMPANY OF SELLER (if applicable)**

Name \_\_\_\_\_

**BENEFICIARY (the Insured)**

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

Insured's or Purchaser's Signature \_\_\_\_\_

**PURCHASER (if other than the Insured)**

Purchaser's Printed Name \_\_\_\_\_  
Address \_\_\_\_\_  
Address \_\_\_\_\_

**This Agreement is funded by life insurance. You may cancel this Agreement without penalty prior to midnight of the third business day after the date of this Agreement. Canceling this Agreement will not cancel any insurance purchased or applied for to fund this Agreement.**

## **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 policy of life insurance from GREAT WESTERN INSURANCE COMPANY and assigns the proceeds of the policy to the Funeral Home. In consideration for the assignment of the policy proceeds, the Funeral Home agrees to accept the proceeds of said policy as full payment for comparable merchandise and services (if specified goods and services are unavailable at time of delivery, the funeral home shall furnish goods and services similar in style and at least equal in quality of materials and workmanship) at any future date, regardless of any price increases. Per Illinois law, neither the seller nor the provider may be named as an owner or beneficiary of the Great Western Insurance policy. **This contract guarantees the contract beneficiary the specific goods and services contracted for. No additional charges may be required. For designated guaranteed goods and services, additional charges may be incurred for unexpected expenses including, but not limited to, cash advances, shipping of remains from a distant place, or designated honoraria ordered or directed by survivors. These are listed as non-guaranteed cash items.**

## **EXCESS POLICY PROCEEDS**

Upon death of the Insured, any accumulations of the policy 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 POLICY 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 policy in force by keeping premium payments current, and allowing all interest and dividends to accumulate. The Insured understands that failure to pay premiums may result in lapse or cancelation of the policy. Insured will not borrow against the proceeds of the policy. The Insured understands that all increases in death benefits from dividends are assigned to the Funeral Home. Any changes in this policy, or should this policy become unenforceable for any reason, or the death benefits are paid under the suicide clause, then this agreement will become null and void.

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

(Applies to all policies except paid-up single premium or full first-day coverage policies.) If Insured dies by other than accidental means during the first two policy-years, either the estate or the family must pay the balance due on the Statement of Funeral Goods and Services selected. The balance due on the Statement of Funeral Goods and Services Selected shall not exceed the prices set forth by the Agreement less the amount of premiums paid.

## **IRREVOCABLE ASSIGNMENT OF BENEFITS**

The irrevocable assignment is used when it is desirable to protect the policy values from attachment. The irrevocable assignment transfers the benefits of the policy to the designated funeral establishment and is consideration for the Statement of Funeral Goods and Services Selected. The assignment cannot be revoked and all other incidents of ownership are waived by the policy owner. The policy cannot be cashed in. The cash surrender value to the Insured is zero.

## **ASSIGNMENT OF OWNERSHIP**

The assignment of the ownership of the insurance policy is revocable, except that a purchaser may irrevocably assign ownership of an insurance policy used to fund a guaranteed price preneed contract to a person or trust for the purpose of obtaining favorable consideration for Supplemental Social Security Income benefits (SSI), Medicaid or other public assistance.

**This assignment may be revoked by the assignor or assignor's successor or, if the assignor is also the insured and deceased, by the representative of the insured's estate before the rendering of the cemetery services or goods or funeral services or goods. If the assignment is revoked, the death benefit under the life insurance policy shall be paid in accordance with the beneficiary designation under the insurance policy.**

## **CHANGE OF INSURED'S ADDRESS AND /OR PROVIDER**

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 insurance policy will go to Insured's estate, unless an Irrevocable Assignment of Benefits has been executed in which case the Funeral Home agrees to forward the proceeds of said policy to the provider of the funeral services and merchandise. If the Funeral Home is changed due to change of address or preference, the new provider is under no obligation to honor the provisions of this agreement. Please notify the Funeral Home and Great Western Insurance Company, in writing, of any changes.

## **CANCELLATION**

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

## **NATURE OF RELATIONSHIP**

If the Seller is not the Provider in this Agreement, then the Seller and the Provider have a binding written agreement that allows the Seller to represent the Provider in contracting with the Purchaser for the goods and services designated in this contract. The funding entity for this contract is Great Western Insurance Company.

## **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; 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.