

PROCEDURES FOR AMENDING PREVIOUSLY-FILED PRENEED CONTRACTS

1. An inflation-proof preneed contract cannot be amended to become a standard preneed contract. Instead, a standard preneed contract must be filed with the Board as a new preneed contract, along with the \$20.00 filing fee.
2. An irrevocable preneed contract cannot be amended to become a revocable preneed contract. Instead, the revocable preneed contract must be filed with the Board as a new preneed contract, along with the \$20.00 filing fee.
3. A standard preneed contract (trust or insurance) on file can be amended to an inflation-proof preneed contract without an additional filing fee. To do so, complete and file with the Board the appropriate inflation-proof preneed contract (either trust or insurance) and the inflation-proof statement of goods and services selected. Simply write across the top of the new contract as follows: “Changing from Standard to Inflation-Proof Only.”
 - a. All funding from the original standard preneed contract must be included on the amended inflation-proof preneed contract.
 - b. The goods and services statement must include selections.
 - c. Trust contract amendments must be sent to the financial institution where the funds are held in trust.
 - d. The amended preneed contract must match the original preneed contract on file regarding the designation as revocable or irrevocable.
4. A revocable preneed contract (either Standard or Inflation-Proof) can be amended to an irrevocable preneed contract without an additional filing fee. To do so, complete and file with the Board a new preneed contract on which the customer has initialed the “irrevocable” block. If this is the only change to the preneed contract, write across the top of the new preneed contract as follows: “Changing from Revocable to Irrevocable

only.” **Do not simply cross out the revocable initials on the original contract and change to irrevocable on the original contract.** A statement of goods and services selected is required if one has not been previously filed.

5. A standard preneed contract (either trust or insurance) can be amended to include a different funding source (either trust or insurance) without an additional filing fee. To do so, complete the appropriate standard preneed contract (adding the different funding source) and write across the top of the new standard preneed contract, as follows: “Amendment.”
 - a. All funding from the original standard preneed contract must be included on the amended preneed contract, if the funding is still being used to fund the preneed contract.
 - b. Trust preneed contract amendments must be sent to the financial institution where the funds are held in trust.
 - c. The amended preneed contract must match the original preneed contract on file regarding the designation as revocable or irrevocable.
6. A standard insurance preneed contract can be amended to include additional insurance policies without an additional filing fee. To do so, complete a new standard insurance preneed contract or submit a copy of the insurance application or notification to the insurance company for the additional funding to the Board. If no statement of goods and services selected was filed with the original contract, submit a completed statement of goods and services selected to the Board.
7. A standard trust preneed contract can be amended to include additional trust deposits without an additional filing fee. To do so, submit a copy of the check, deposit slip, or balance print-out to the Board. If no statement of goods and services selected was filed with the original contract, submit a completed statement of goods and services selected to the Board.
8. An inflation-proof preneed contract can be amended to include additional funding. To make such changes, a new inflation-proof preneed contract must be completed and the goods and services selected must equal the amount used to fund the preneed contract. A new filing fee is not required.

9. If the only amendment to the preneed contract is a change in the statement of goods and services selected, the contract can be amended by submitting the revised statement of goods and services selected to the Board. However, when there is a change to the selections on the statement of goods and services selected for an inflation-proof preneed contract, a new preneed contract must be completed and filed with the Board. A new filing fee is not required.

10. A standard contract and an inflation-proof contract filed simultaneously for the same preneed contract beneficiary requires a \$20.00 filing fee for each contract.

11. Notify the Board of any and all name and/or address changes, bank name and/or trust account number changes, and/or insurance company name and/or policy number changes to any type of preneed contract.