

**NORTH CAROLINA BOARD OF FUNERAL SERVICE
INFLATION-PROOF PRENEED TO AT-NEED CONTRACT CALCULATOR**

Decedent's Name: _____

(16)

COP
Match
UP

Preneed Contract Information

Funding:

Total value of all funding sources on preneed contract date: (1)

(total amount deposited into trust and/or total death benefits payable from pre-existing insurance policies)

PRENEED CONTRACT: Inflation-Proof Preneed Statement of Funeral Goods and Services Selected

Total charges for guaranteed preneed funeral goods and services: (2)

Total charges for non-guaranteed preneed cash advance & tax items: (3) **A.**

Total charges listed on preneed statement of funeral goods and services selected: (4)

Total excess funding on preneed contract date: (5) **B.**

Adjustments

Total preneed services / merchandise Items <u>NOT USED AT-NEED</u> (list below):	<input style="width: 100%; text-align: center;" type="text" value="\$0.00"/>	(6)
		i.
		ii.
		iii.
		iv.
		v.

TOTAL AT-NEED PAYOUT FROM ALL PRENEED FUNDING SOURCES (7)

Percentage of Preneed funds to be credited to family at-need: (8)

Dollar equivalent*: (9) **C.**

*(total amount of funds to either be allocated toward at-need cash advance/tax items or refunded per N.C. Gen. Stat. § 90-210.64)

AT-NEED: Statement of Funeral Goods and Services Selected

Total at-need cash advance items: (10)

Total at-need sales tax: (11)

Total service / merchandise Items added <u>AT-NEED</u> (list below):	<input style="width: 100%; text-align: center;" type="text" value="\$0.00"/>	(12)
		vi.
		vii.
		viii.
		ix.
		x.

Total at-need balance of cash advances, tax, and additional goods or service items: (13) **D.**

Less total amount of funds to be credited at-need, or (9) , above: (14)

Total amount due funeral establishment / to be refunded: (15) **E. or F.**

([-] = amount of refund to family/estate; [+] = amount due funeral establishment)

(N.C. Gen. Stat. § 90-210.64(d) requires any refund in excess of \$1,000.00 to be issued to the decedent's estate or to the clerk of court in the county where probate proceedings would occur if the decedent had an estate.)

Please print and/or retain this calculator in the decedent's closed preneed contract file.