

PRENEED SUBSTITUTION OF FINANCIAL INSTITUTION FORM

North Carolina General Statute 90-210.68(b) provides that a trustee may transfer funds from one approved financial institution to another. The purpose of this form is for a preneed funeral establishment to transfer the individual preneed trust funds to a successive approved financial institution. It shall not be used to transfer a preneed contract to a substitute funeral establishment.

Name of
Preneed Establishment: _____ Preneed Establishment No. _____

Financial Institution: _____

Name and address of bank

As authorized by General Statute 90-210.68(b), request is hereby made to close the above preneed funeral account for the purpose of transferring it to a successive financial institution.

Request to close the account associated with the preneed contract for _____

Account no. _____ dated _____

By Licensee: _____

____ If the contract is revocable, by initialing this line I certify that the purchaser/beneficiary has been notified of the intended transfer.

In compliance with North Carolina General Statute 90-210.68(b) and at the request of the above trustee, trust account number _____ in the amount of \$ _____, was paid to the successive financial institution named below on _____, 20____.

Acknowledged by authorized bank representative:

Signature

It is acknowledged that this transferee financial institution accepts the above amount on _____, 20____, are bound as "financial institution" to the above described preneed funeral contract, have received a copy of the existing preneed contract and agree to adhere to such provisions of General Statutes Chapter 90, Article 13D, as pertains to "financial institutions."

Transferee Financial Institution

Address

Account No. _____ Acknowledged by bank representative: _____
Signature