

## SAMPLE INSURANCE LETTER

Dear Sir or Madam:

Our funeral home has received a financial interest in one or more insurance policies issued by your company as part of a preneed funeral contract. North Carolina law requires our firm to provide an annual report of preneed funeral contracts to our state licensing board, the North Carolina Board of Funeral Service, by March 31, 20\_\_\_. By issuing or recording an interest to our firm in any life insurance policy, you are required to provide our firm with a year-end account balance to submit in our annual report. See N.C. Gen. Stat. § 90-210.68(d). Customer authorization is not required for you to release this information. See 16 C.F.R. § 313.15.

Our firm has not received year-end account balances for the following policies: LIST POLICIES.

Please respond within five (5) business days of receipt. You may contact me at TELEPHONE if you have any questions.

Sincerely,

LICENSEE

Enclosure