

Virtual Preened: Explanation of Enclosures/Email Content Virtual Appointment Follow-up by Kelly Owens

Rita and Butch as promised I've attached several documents for your review and in anticipation of our next discussion. Because of the size of the multiple attachments I decided to send in 2 emails. As stated on the phone, please call with questions or write them down so that we may cover them in our next conversation. You'll actually get a 3rd email with an invitation and link for our virtual discussion (fingers crossed all goes well 😊)

Attachments:

1. Arrangement Folder: Complete Yellow Highlighted areas. I will review them with you during our next phone conversation

FYI – There are 3 SECTIONS OF A FUNERAL CONTRACT SERVICES, MERCHANDISE & CASH ADVANCES

2. Based on our initial conversation, I have created and enclosed a DRAFT “Prepaid Funeral Contract/ statement of Goods and Services” – we will review this at length during our next phone conversation. Prices are ESTIMATES. We will finalize and discuss on the phone to determine your actual cost. As stated above there are 3 sections to a funeral contract that we will discuss.
 - 1) **Services:** General Price List enclosed – this breaks down the associated cost of services of the funeral home and is carried over to Section 1 of the Goods and Services agreement. We will discuss during our conversation
 - 2) **Merchandise:** Section 2 of the Goods and Services statement is Merchandise. I've enclosed a picture of the Marbelon urn, which is best for in ground burial of cremains. The cost is reflected in the merchandise area of the Goods and Services Statement along with other necessary and optional merchandise. Again, we will discuss this in our conversation.
 - 3) **Cash Advance Items:** “Cash Advance” brochure. This helps identify the other costs of a funeral and are detailed in Section 3 of the Goods and Services Statement.

Other attachments (separate email)

3. “Ask me About” brochure. Take a look at this document and see if there are other items you wish to discuss or have questions about.
4. Medicaid brochure. This brochure is reflective of the fact that all prepaid funeral contracts are Exempt from the Medicaid Asset limit and spend down rules.
5. “About Us” brochure tells you a little bit about the organization that acts as trustee of the prepaid accounts and performs all necessary underwriting if applicable.
6. “Cremation Frequently Asked Questions” brochure is provided given you selected cremation as your final disposition type.
7. Notes Page
8. Household firebox listing – we will briefly discuss this document during our conversation. I will explain its important purpose.