

# INSTRUCTIONS FOR SUBMITTING A PRENEED CLAIM

Revised 9/1/2009

## If you are the original Preneed Contract Provider:

### Items needed:

1. Claimant Statement signed by the policy beneficiary (beneficiary on the application) **25.10.(c)(3)**
2. Certified Death Certificate
3. At Need Contract (invoice)  
Invoice must include ALL of the following:
  - a. Purchasers signature (beneficiary on the application)
  - b. Funeral director's signature or casket store manager's signature
  - c. Merchandise descriptions must have the **same level of detail as that on the preneed contract for casket & OBC**
    1. Casket name & amount
    2. Material (gauge if metal)
    3. Seal/non-seal
    4. Protective/non-protective
    5. Interior lining
    6. Shell
    7. Handles/swingbar
  - d. **Preneed prices should be frozen or inflation discounts properly reflected 25.3.(d)(1)**
  - e. Preneed discounts properly reflected
- f. Payments/deposits made by the family are reflected in the amount due section of Invoice.
- g. Insurance policy/Contract payment reflected in the amount due section of the invoice
  1. Contracts that are paid up (current) should reflect the Pre-Need Contract Price on the At-Need Invoice
  2. Contracts that are not paid up should reflect the amount payable under the policy on the At-Need Invoice
4. Pre-Need to At-Need Reconciliation Form -- see miscellaneous forms at <http://www.banking.state.tx.us/forms/forms.htm#pfc>
5. Copy of price list if invoice shows current prices (not preneed prices)
6. Certificate of Performance (signed by beneficiary)
7. Policy or Lost Policy Affidavit (signed by beneficiary)
8. Revocable or Irrevocable Assignment (if applicable)

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## If you are not the original Preneed Contract Provider:

### Items Needed:

1. Notarized Assignment of Proceeds Form (signed by the beneficiary)
2. Claimant Statement
3. Certified Death Certificate
4. Original Policy or Lost Policy Affidavit

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Contact Preneed Claims if you have any questions at (972) 699-2707.