

PRENEED FUNERAL TRUST FUND
TRANSFER MEMORANDUM

TO: _____

Name and Address of Financial Institution

FROM: _____
Trustee (Preneed Funeral Establishment)

SUBJECT: Closing of Account No. _____

(Beneficiary)
Preneed funeral contract dated _____

North Carolina General Statute 90-210.68(b) provides that a trustee may transfer trust funds from one approved financial institution to another.

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.

Trustee (Preneed Funeral Establishment) Preneed Funeral Establishment License No. _____

BY: _____

_____ 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 request made by the above trustee, Deposit Account No.

_____ in the amount of \$ _____, was paid to the successive financial institution named below on _____, 20 ____.

Financial Institution

BY: _____

Pursuant to North Carolina General Statute 90-210.68(b), it is acknowledged that this transferee financial institution accepted the above amount on _____, 20 ____ and will be bound, as "financial institution," to the above-described preneed funeral contract (a copy of which it has received) and to such provisions of General Statutes Chapter 90, Article 13D, as pertain to "financial institutions."

Transferee Financial Institution

Address

BY: _____

Account/Certificate No. _____

SEND A COPY OF THIS TRANSFER MEMORANDUM TO THE BOARD WITHIN TEN (10) DAYS OF TRANSFER.

Mail to: NC Board of Funeral Service
1033 Wade Avenue, Suite 108, Raleigh, NC 27605
(919) 733-9380