

DISCLOSURE AND CONSENT FORM
FOR PRENEED LIFE INSURANCE OR ANNUITY PURCHASED BY PRENEED TRUST

ALABAMA LAW REQUIRES THAT CERTAIN PORTIONS OF THE PRICE PAID FOR A PRENEED CONTRACT BE PLACED IN TRUST IF THE CONTRACT IS TRUST FUNDED. THE PRENEED CONTRACT BENEFICIARY MUST CONSENT IF THE TRUST INTENDS TO INVEST SOME OR ALL TRUSTED FUNDS IN LIFE INSURANCE OR ANNUITIES ON THE LIFE OF THE PRENEED CONTRACT BENEFICIARY.

IF YOU HAVE QUESTIONS THAT ARE NOT ANSWERED BY THIS FORM, YOU
SHOULD CONTACT THE INSURANCE COMPANY BEFORE COMPLETING THIS FORM.

Name of Preneed Beneficiary _____ Date of Birth _____

Address of Preneed Beneficiary _____

Preneed Provider (Name of Funeral Home) _____

Address of Preneed Provider _____

Preneed Contract No. _____ Purchase Price of Preneed Contract _____

Trust name or identifier: _____

Name of Trustee _____

Address of Trustee _____

Name of Insurance Company _____

Address of Insurance Company _____

Amount of Insurance or Annuity to be Purchased _____

Current Amount in Trust _____ Premium Required to Purchase Insurance or Annuity _____

Amount That Will Remain In Trust (if any) After Insurance Purchase _____

I understand that, if I consent:

- **A life insurance policy, life insurance certificate, or annuity (the "Policy") will be issued on my life by the above-named Insurance Company. If I pay for my Preneed Contract in installments, several Policies may be issued.**
- **The Policy will be issued to the above-named Trust.**
- **The maximum face amount of the Policy will not exceed \$_____ at the time the Policy is issued. If several Policies are issued, the total face amounts of all will not exceed \$_____.**
- **The Policy will never exceed the lesser of \$20,000 or 100% of my preneed contract's purchase price.**

