

1. PERSON TO BE COVERED BY THE PLAN

Title ..... Family name ..... Date of birth .....
Given names .....
Address .....
Town ..... County .....
Postcode ..... Telephone .....

2. YOUR NAME AND ADDRESS (if you are buying the plan for someone else)

Title ..... Family name ..... Initials .....
Address .....
Town ..... County .....
Postcode ..... Telephone .....

3. COST OF THE SELECTED FUNERAL (attach funeral plan details form)

Table with 2 columns: Description and Amount. Rows include: Services to be provided by Welham Jones (£), Amount included for cremation disbursements, OR (£), Contribution made toward burial disbursements (£), Funeral Planning Services administration fee (£ 65), Total plan cost (£).

WELHAM JONES
Funeral Directors & Monumental Masons



place office address sticker here

4. PAYMENT & SIGNATURE (delete as appropriate)

I wish to purchase a funeral plan as outlined above. I have read the terms of sale overleaf and understand that the price guarantee will NOT apply until the plan is fully paid.

- a) I enclose the total plan cost set out above, OR
b) I enclose a deposit of £ ..... and will send a cheque for the balance within six months at no extra cost, OR
c) I enclose an initial deposit of £ ..... and wish to pay the balance in equal instalments spread over ..... Months. Please confirm and send me details of the total cost along with a bank standing order mandate.

Signed ..... Date ...../...../20....

NOTES

Please make cheques payable to FUNERAL PLANNING SERVICES so that your money will be paid directly into the trust.

There will be no price increase in price guaranteed items provided any balance due is paid with six months. Alternatively, your plan can be paid by equal monthly instalments spread over any period from one to five years, but the total cost will be higher because of the time delay and extra administration involved.

For more information on payment options please ask us, or contact Funeral Planning Services direct on 0800 41 30 46.

## Funeral Planning Services - Terms of Sale

These terms apply to the purchase of funeral plans provided by Funeral Planning Services Limited ("FPS") and funded by Funeral Planning Trust ("the Trust"). References to "you" or "your" mean the customer or the customer's representative or executor

### 1. How the funeral plan works

1.1. You choose the service as itemised and pay the agreed plan price to the Trust. The price usually includes the funeral director's fee, administration costs and an allowance for other funeral expenses known as disbursements. You may select the funeral director or FPS will select a firm on your behalf. The funeral director guarantees to provide the service for you when required. Once the funeral plan has been accepted the administration costs are withdrawn from the Trust and paid to FPS.

### 2. Your responsibilities

2.1. To pay the plan price in full, provide your name, year of birth and address, and advise any subsequent change of address.

2.2. To advise your next-of-kin, or whoever will be responsible at the time of the funeral, that you have purchased a funeral plan and give him or her the simple instructions about what to do at the time, which will be included with your guarantee certificate.

2.3. To keep your guarantee certificate safe and make sure that your next-of-kin or executor has access to it when necessary. Further copies are available for a small charge.

### 3. FPS responsibilities

3.1. To deposit all funeral plan payments into the Trust, to be controlled by the managing trustees in accordance with the trust deed.

3.2. To arrange for the selected funeral director to give the guarantee or, if the selected funeral director cannot give the guarantee or provide the funeral when required, arrange for an alternative funeral director to give the guarantee.

3.3. If the selected funeral director is unable to give or honour the Funeral Plan Guarantee and FPS are unable to arrange an alternative funeral director to give or honour the guarantee, your application may not be accepted or the plan may be cancelled.

3.4. To issue a Funeral Plan Guarantee certificate to you, confirming your guarantee from the funeral director.

3.5. Following registration of the death and provision of the specified funeral, to arrange for the appropriate amount to be withdrawn from the Trust and paid to the funeral director.

3.6. To comply with all laws and regulations governing the sale and administration of funeral pre-payment plans.

3.7. To maintain complete confidentiality about your arrangements at all times, except as required for the administration of the plan.

3.8. FPS have no financial obligation to you other than to comply with these terms of sale.

### 4. The funeral director's responsibilities

4.1. To provide the funeral director's services as itemised in the Guarantee in return for a payment from the Trust, without further charge to you or your family. If any of the materials specified are not available when required, the funeral director may substitute similar materials of equal value. If any additional goods or services are required, which

are not included in the plan guarantee, the funeral director will charge for these as appropriate.

4.2. If the selected funeral director cannot provide the funeral as itemised in the Guarantee, for whatever reason, FPS will arrange for an alternative funeral director to give the guarantee, subject to clause 3.3.

### 5. Payment by instalments

5.1. You can pay a deposit or instalments towards a plan but the guarantee does not apply until the Trust has received the full plan price. The full plan price will be the price of the selected plan prevailing at the time of the final payment unless agreed otherwise. Please note that it will usually cost more to pay by instalments over a period than it would to make a single payment at the start.

5.2. If you die before the plan is fully paid FPS will deduct the administration costs and pay the funeral director, or refund to your estate, the balance of any payments received.

### 6. Your right to cancel

6.1. You may cancel the plan at any time before the funeral by returning the original Funeral Plan Guarantee Certificate to FPS with your instructions in writing. Once the funeral service has been provided through the plan, the plan cannot be cancelled.

6.2. If the plan is cancelled FPS will deduct the administration costs and refund to you the balance of any payments received, except that if you notify FPS within one month of your application being accepted your payment will be refunded in full.

### 7. If you have a complaint

7.1. If you have a complaint about FPS please contact FPS in the first instance and we will endeavour to resolve the matter. If your complaint cannot be resolved by FPS you may refer it to the Funeral Planning Authority ("the FPA"). FPS is required to comply with the FPA Code of Practice for funeral plan providers, to co-operate with the FPA complaints and disputes procedure and to abide by the decisions of the FPA Compliance Committee. A copy of the FPA Code of Practice is available from FPS or can be viewed on [www.funeralplanningauthority.com](http://www.funeralplanningauthority.com)

7.2. If you have a complaint about the services provided by the funeral director please contact the funeral director in the first instance. If your complaint cannot be resolved by the funeral director, he or she will refer you to the relevant authority or FPS will advise you accordingly.

### 8. Notes

8.1. The agreement between you and FPS consists of the application form, the Funeral Plan Guarantee certificate and description of the funeral selected and these terms of sale. The terms cannot be varied unless agreed and signed by FPS and you.

8.2. The Funeral Plan Guarantee is personal to you and cannot be sold or used as security for a loan.

8.3. The price of the funeral plan excludes VAT (funerals are not currently subject to VAT) or any other tax which may be introduced in the future.

8.4. If there is any dispute English law will apply.

8.5. These terms of sale apply to plans purchased from 8<sup>th</sup> April 2002 and replace any prior dated terms.