

FREEMAN BROTHERS

FUNERAL DIRECTORS



Prepaid Funeral Plan Tailormade Application Form





Tailormade Prepaid Funeral Plan Application Form

Planholder's details

Title (Mr, Miss, Mrs, Ms) Other (please specify) _____

Surname _____

Forenames _____

Address _____

Postcode _____

Telephone number _____ Email address _____

Funeral requirements and other information (i.e. burial plot details, music choices, charity for donations, any other requests)

Nominated representative's details

This is the person whom you have chosen to take responsibility for dealing with your funeral arrangements. We will write to your nominated representative to make them aware of their responsibilities, and provide them with a summary of the services included and excluded.

Title (Mr, Miss, Mrs, Ms) Other (please specify) _____

Surname _____

Forenames _____

Address _____

Postcode _____

Telephone number _____ Email address _____

Relationship of your nominated representative to you _____

Has your nominated representative been consulted about this role? Yes No

Please tick this box if you have chosen not to have a nominated representative. By selecting this option you are confirming that you are aware of the benefits of having someone to act as your nominated representative and it is your decision to decline this:

Your nominated representative's personal data will be subject to the same responsibilities as your own, as outlined in our privacy notice.

In the event that your nominated representative predeceases you, their contact details change or you wish to change your nominated representative, please complete and return the enclosed form. Additional forms available on request.

Specified arrangements:

Services for the funeral including: advice and help when the arrangements are made; bringing the deceased person into our care from within mainland Great Britain; preparation and care of the deceased person; provision of the hearse; and attendance of our staff before, during and after the funeral service:

- | | |
|---|---------|
| | £ _____ |
| • The supply and preparation of the _____ style coffin | £ _____ |
| • The provision of _____ limousine(s) | £ _____ |
| • Visiting in the Chapel of Rest | £ _____ |
| • Collection of donations in lieu of flowers | £ _____ |
| • Charges related to the cremated remains (if applicable) | £ _____ |

Other items

_____	£ _____
_____	£ _____
_____	£ _____

Disbursements (third party fees)

- | | |
|-------------------------------------|---------|
| • Crematorium/cemetery fee | £ _____ |
| • Doctor's fee for cremation papers | £ _____ |
| • Officiant's fee | £ _____ |
| • Cost of press notices | £ _____ |
| • Church and organist's fees | £ _____ |
| • Gravedigging fee | £ _____ |
| • Fees related to cremated remains | £ _____ |
| • Removal of Memorial | £ _____ |

Other items

_____	£ _____
_____	£ _____
_____	£ _____

Total cost of tailormade plan

£ _____



Payment details:

Initial lump sum payment* £ _____
Monthly instalment £ _____
Final lump sum payment £ _____
Total cost £ _____

*This can be the full amount or any initial lump sum agreed as part of a monthly instalment plan.

There is no interest charged for paying by instalments.

To pay us by bank transfer please use the following details:
Sort code: 40-51-62 Account number: 12335988

Account held in the name of 'Freeman Brothers' at Handelsbanken, Crawley

Please use your full name as a reference and please tick here to confirm this is how payment has been made

For office use only:

Payment made _____ (date) _____ (via) _____ (Salesperson initial)

Customer declaration

Please tick each section to confirm that you have read and understood the information provided. By signing and dating this form, you are confirming that you have understood each section of this declaration.

I have read the Freeman Brothers Prepaid Funeral Plan brochure and Terms and Conditions, and fully understand the services included in and excluded from my tailor-made funeral plan.

I confirm that, whilst they have provided me with factual information about the prepaid funeral plan product, Freeman Brothers has not given me financial advice. Using the information provided, I am happy that the chosen product meets my demands and needs.

If you are paying by instalments, please read carefully the section in the Terms and Conditions document under the heading 'If you die before making all the payments' and confirm: I fully understand the consequences, in the event that I die before I have paid for the plan in full, as does my nominated representative (where applicable).

Marketing: Freeman Brothers will contact you from time to time (as required by legislation) with information regarding your purchased product. In addition, we might like to contact you occasionally with other information that may be of interest. Please indicate how you would be happy to receive such information:
Post Phone Email

We will never sell your data.

Signed _____ Date _____

Value declaration

Freeman Brothers wants to ensure that customers who choose to pay for their funeral in advance receive good value in comparison to buying an equivalent funeral at the point it is purchased. Our prepaid funeral plans are priced to be cheaper, or cost the same as, an equivalent at-need funeral provided by Freeman Brothers.

For our tailor-made plans, one of our team will discuss your funeral requirements with you and your plan will be priced as an equivalent at-need funeral offered by Freeman Brothers at the time of purchase. For more information about value comparisons for our direct cremation plan and tiered plans, please see the application form for each product.

The money paid for a prepaid funeral plan is invested in the Freeman Brothers Funeral Trust. There is a charge of £199.00 if the plan is cancelled after 30 days or the moratorium period, for plans sold on an instalment basis.

Note about Freeman Brothers' use of personal data

The General Data Protection Regulation (GDPR) gives you rights over the processing of your personal data, by whoever and wherever it is held.

Details of what information Freeman Brothers collects, its source and the legal basis for this are set out in Freeman Brothers' privacy notice, which may be accessed on our website at <https://www.freemanbrothers.co.uk/privacy/> or a paper copy can be provided on request.

If you pass us personal data about any third party, e.g. your nominated representative, you should ensure that they are aware of the content of this notice. Freeman Brothers' policy is to keep any information obtained from you secure and confidential, and only use it for the purposes of providing a prepaid funeral plan, or as may be specifically agreed with you.



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Sept 2023

