

Brookfield
General Office
1875 N. Calhoun Rd.
Brookfield, WI 53005
Cudahy
3774 E. Underwood Ave.

New Berlin
15250 W. National Ave.
Northwest
6709 W. Capitol Dr.

Church and Chapel Funeral Homes

There's One Near You

South
1910 W. Becher St.
Waukesha/Pewaukee
Bluemoond Rd. at Hwy. J

West Allis
7626 W. Greenfield Ave.
Preplanning Centers
9230 W. Bluemoond Rd.
Milwaukee
414-456-9100
380 Bluemoond Rd, Waukesha
262-549-9100

Funeral Preplanning General Information (414) 476-0052 • (262) 827-0659

Experience has shown preplanning funeral service is prudent. Preplanning is an excellent way to allow personal wishes to be shared and known in advance. Provided is some general information as follows:

1. Preplanning a funeral allows personal wishes to be known in advance. Please share your wishes with family and give them copies of any formal preplanned arrangements and documents.
2. Preplanning a funeral does not mean you have to financially fund it. However, if you do prefund the funeral, there are many advantages in doing so. If you do not wish to fund the preplanned funeral, fees at the time of passing or at the time the preplanned funeral is funded would be applicable.
3. Any amounts of money that are prefunded are deposited in an insurance policy or bank trust account. No money for a preplanned funeral is deposited or held with the funeral home.
4. If a bank trust is selected to hold the funds, an annual 1099 will be given to the trust owner indicating the interest earned in that trust and tax on the interest earned would be applicable. If an insurance policy is selected, no 1099's are given and the interest (growth) earned is tax exempt.
5. Choosing an insurance policy will allow the depositor to make a one time lump sum payment, annual payments whether for a 3, 5, or 10 year policy, semi annual payments, or monthly payments as long as any payment time frame does not exceed 10 years. If a bank trust is selected, every deposit would create a new trust and associated 1099 and have tax consequences.
6. Prefunding a funeral may be an exempt allocation of financial assets for Title 19 considerations if the insurance policy or bank trust is made irrevocable. There may be financial limits for items allowed to be prefunded for Title 19 considerations.
7. Church and Chapel guarantees our funeral service fee, the merchandise we sell, and our fee for the use of our funeral home chapel if desired. This means we guarantee the earnings growth within the insurance policy or bank trust will be sufficient to cover our future cost increases, if any, for our service fee and the merchandise we sell. If not, a credit is given to cover the difference for our services and the merchandise we sell. This guarantee is not applicable to outside merchandise/services that we do not sell or provide services called cash advance items like: clergy stipends, cemetery fees, beautician fees, organist, soloist, cantor, luncheons, outside chapel rentals, monuments and/or engravings, death certificates, flowers, newspaper notices, medical examiner, air fare, or other.
8. All the financial growth within the insurance policy or bank trust first gets applied to the future funeral service fee and merchandise the funeral home sells. All left over financial growth funds will get applied to the cash advance items.
9. Should new or additional items, merchandise, services, or cash advances be added at the time of passing, they are not subject to the prefunded guarantee and would be subject to the current fees.
10. Should there be a remaining balance in the prefunded funeral account; a refund to the family may be applicable. Prior to issuing refunds, our firm needs to confirm with the Wisconsin Estate Recovery Program as if the deceased person was receiving Title 19 benefits, they (the state) may be entitled to the refund.

I have read and understand this information

Signature(s) Pre-Planned Client(s)

Date

Pre-Need Counselor

White: Preplanned client

Signature(s) at time of passing

Date

At-Need Counselor

Pink: At time of passing Family

C&C FPI Rev. 3/07

Yellow: File