FUNERAL PLANNING

ADMINISTRATION REQUIREMENTS

Much of this information will come from the Funeral Plan provider

Clients Name: **Date:**

Enclosed with letter to client	1. Suitability report and recommendation from Interface Financial Planning - included within the client letter	☐
	2. Personalised quotation (from funeral plan provider)	☐
	3. Plan details and product features (from funeral plan provider)	☐
	4. Instructions for Next of Kin (from funeral plan provider)	☐
	5. Funeral Wishes form for completion and submission with application	☐
	6. Product details including Definitions, what the plan covers, what the plan does not cover, general procedures, & cancellation (from funeral plan provider)	☐
	Date Sent: Sender:	

Enclosed with letter to nominated representative	1. Plan Certificate (from funeral plan provider)	☐
	2. Instructions for Next of Kin (from funeral plan provider)	☐
	3. Funeral Wishes form completed by Client	☐
	4. Plan details and product features (from funeral plan provider)	☐
	5. Product details including definitions, what the plan covers, what the plan does not cover, general procedures, & cancellation (from funeral plan provider)	☐
	Date Sent: Sender:	

V1.0 (July 2022)