

Funeral Plan Payment Confirmation Form

In light of COVID-19 restrictions, it may not be possible to provide all the features set out in the pre-paid Golden Charter funeral plan. Please confirm which of the following options apply and return this with your final invoice to Golden Charter.

Plan number _____

Name of deceased _____

All features of the plan have been provided with no change	
A refund value has been used to offset other shortfall	
A refund value has been used to provide other services that have been requested	
A refund of _____ has been agreed and paid or will be paid by me/us to the family or estate	
The funeral plan was not fully paid and the amount paid to me/us has been applied as a contribution towards the total cost of the funeral	

I confirm the options, services and actions as detailed above have been discussed and agreed with the family and that any refund value agreed is reasonable and proportionate to the features of the funeral plan which have not been provided.

I further confirm that I will promptly pay any applicable refund on behalf of Golden Charter Limited to the relevant person and will free Golden Charter Limited of any responsibility for loss or damages, now and in the future, for claims made by any family member, beneficiary or other person acting on behalf of the plan holder in relation to any failure by me/us to observe the terms of this confirmation and supplementary guidance.

Business name _____

Signature

(if completing online, typed signature acceptable)

Date

(dd/mm/yy)

*Your invoice will not be paid until Golden Charter has received this completed form and supporting invoice.

Funeral Plan Payment Confirmation Form Supplementary Guidance

When identifying who should be paid the refund, apply the same rigour you would when identifying the individual you will take instructions from for the funeral. This may be the next of kin, the person arranging the funeral, the executor, the estate or the person who paid for the plan if not the plan holder.

If you are unable to identify the individual or estate that the refund is due to be paid to, contact us for assistance.

Always keep a record of the discussion and your agreement to pay any refund, including details of who the refund was paid to. This must be stored securely by you and accessible should any query arise in future.