



Oklahoma Insurance Department  
Financial Division/Prepaid Funeral Benefit Section  
400 Northeast 50th Street, Oklahoma City, OK 73105

# APPLICATION TO TRANSFER PRENEED FUNDS

(THIS FORM TO BE USED ONLY WHEN FUNDS ARE BEING TRANSFERRED BETWEEN PRENEED FUNDS)

The undersigned buyer requests that \$ \_\_\_\_\_ representing all capital and interest and less any administrative fees and applicable taxes be transferred in full from the preneed fund at \_\_\_\_\_, Oklahoma, to the preneed fund at \_\_\_\_\_, Oklahoma.  
The account is in the name of \_\_\_\_\_ with \_\_\_\_\_ named as beneficiary.

## REASON FOR TRANSFER REQUEST

1. Buyer requests transfer of existing and unused preneed funds. \_\_\_\_

## IF NUMBER 1 IS BEING USED, THEN CHECK AND COMPLETE THE FOLLOWING STATEMENTS THAT ARE APPLICABLE:

1. The above contract is non-specified. \_\_\_\_  
2. The above contract is irrevocable. \_\_\_\_  
3. The above contract is guaranteed. \_\_\_\_

## IF NUMBER 3 IS CHECKED, THEN ONE OF THE FOLLOWING STATEMENTS MUST BE COMPLETED AND SIGNED BY THE APPROPRIATE PARTY:

I, \_\_\_\_\_, by accepting these guaranteed preneed funds agree to furnish the services and funeral merchandise as originally selected.

\_\_\_\_\_  
FUNERAL HOME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY & STATE

I, \_\_\_\_\_, the Contract Buyer, hereby release both preneed funds and related funeral homes from any further responsibility under the guaranteed contract.

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY & STATE

## MEMO TO ALL PARTIES: IF THE CONTRACT IS IRREVOCABLE, A COPY OF THAT FORM MUST BE FURNISHED TO THE FUNERAL HOME RECEIVING THE FUNDS.

2. Death of the beneficiary with the receiving funeral home having supplied the funeral merchandise and service.

If the contract was a guaranteed contract and services and funeral merchandise were selected and used without buyer notifying the transferring and or receiving funeral homes that the beneficiary had a guaranteed contract, then both funeral homes are held harmless by the buyer for any obligation listed in the guaranteed contract and the fund is transferred as non-specified funds less any administrative fees and applicable taxes.

## SUBJECT TO THE REASONS CHECKED ABOVE, WE HEREBY SIGN AS AGREEING TO THE ABOVE INFORMATION.

THIS APPLICATION ORIGINATED ON \_\_\_\_\_, 20 \_\_\_\_\_

\_\_\_\_\_  
BUYER SIGNATURE

\_\_\_\_\_  
BUYER NAME PRINTED

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY & STATE

## TRANSFERRING FUNERAL HOME

I hereby agree to transfer the funds.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
FUNERAL HOME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY & STATE

## RECEIVING FUNERAL HOME

I accept the terms of the transfer of the funds, and hereby accept those funds as set forth above.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
FUNERAL HOME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY & STATE

## INSTRUCTIONS

1. While Buyer may originate this form with either the **Transferring Funeral Home** or with the **Receiving Funeral Home**, the signatures in the appropriate places must be completed by the Buyer and the Receiving Funeral Home before the Transferring Funeral Home signs.  
2. The Transferring Funeral Home is responsible for delivering a copy of this form to the Buyer and the Receiving Funeral Home, with a remaining copy retained by the Transferring Funeral Home.