

Case Number: _____



BANK ACCOUNT BURIAL FUND

A bank account designated as a burial fund, requires a signed statement from the applicant identifying the fund's location, type, amount, and account number. The statement must specify the month and year in which he or she first intended to set the fund aside for burial.

The fund can be excluded retroactively back to the first day of the specified month, but no earlier than November 1, 1982. It loses its exemption if it is used for anything other than the person's burial.

The fund set aside for burial must be identifiable, but not necessarily segregated, from other funds.

Name of Client: _____

Type of Bank Account: _____

Name(s) on Bank Account: _____

Name of Bank and Account Number: _____

Is this account set aside for **only** Burial? _____

How much has been set aside for Burial in this Account: _____

When was this account established for Burial? _____

Do you plan to add to this Account for Burial? _____

Signature: _____

Date: _____