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General Guidelines for Preneed Contracts and Cemetery Property Sales Logs

Funeral homes and cemeteries are required to maintain a log of all preneed merchandise and services sales. Endowment care cemeteries are required to maintain a log of all cemetery property sales. A preneed entity that is a combination funeral home/cemetery must maintain both logs. The logs should show all transactions made since April 30, 2002. All funeral homes and endowment care cemeteries will have until April 01, 2010, to construct the log(s) with all historical information from April 30, 2002 to the end of the 2009 calendar year. The log must be in the form of or equivalent to the sample logs listed below. The logs must be available for inspection as of April 1, 2010 and must contain at least the following information:

Preneed Contract Log

[Click here to view Sample Log](#)

1. Preneed contract number
2. Name of purchaser
3. Date of contract
4. Net amount of contract (contract price after insurance credits and all discounts)
5. Type of payments (paid-in-full or installments – PIF or Instl)
6. Paid-in-full amount or cumulative installment payments
7. Paid-in-full date
8. Face amount of insurance sold (if applicable).
9. Cumulative amount trusted for merchandise and services
10. Partial delivery – Yes/No
11. Date delivered
12. Date contract fulfilled (at need)
13. Date contract voided or cancelled

Cemetery Property Sales Log
[Click here to view Sample Log](#)

1. Contract number
2. Property owner
3. Date of contract
4. Net amount of contract (contract price after insurance credits and all discounts)
5. Paid-in-full amount or cumulative installment payments
6. Paid-in-full date.
7. Face amount of insurance sold (if applicable)
8. Cumulative amount due endowment care trust
9. Cumulative amount of endowment care contributions
10. Date of burial (at-need)
11. Date contract voided or cancelled

The following guidelines are to be followed on both the Preneed Contract Log and Cemetery Property Sales Log.

- The company name must be on each page of the preneed contract log and cemetery property sales log.
- The bottom of each page of the logs must be numbered sequentially.
- All contract logs must be typed or printed neatly.
- If the contract logs are not being created using a spreadsheet, all contract items should be completed using black or blue ink.
- If the contract logs are not being created using a spreadsheet, the column for the current payment status, amount in trust etc. may be written in pencil until the contract is paid-in-full.
- All logs must be readily accessible.
- The logs must be in a form that can be copied and scanned