

# HOW TO TRANSFER PRE-NEED ARRANGEMENTS FROM ONE FUNERAL HOME TO ANOTHER



## STEP 1: DECIDE THE FUNERAL HOME YOU WANT TO TRANSFER YOUR PRE-NEED TO

Some important considerations when deciding to transfer a pre-need is to understand why you would like to transfer from your current funeral home to a different one. Sit down with funeral directors at other funeral homes to see if their ideas align with yours and fulfill what is lacking at your current funeral home.

## STEP 2: CALL THE FUNERAL HOME YOUR ARRANGEMENTS ARE MADE AT

Two important documents you will need to obtain are a copy of your pre-need file and the insurance paperwork.



## STEP 3: BRING THESE DOCUMENTS TO THE NEW FUNERAL HOME

Explain that you would like to transfer your pre-need arrangements from funeral home A to this funeral home. The funeral directors will take it from there, including contacting insurance or whomever has the funds and getting the appropriate forms for the transfer for you to sign.

### ARE THERE ANY FEES THAT I HAVE TO PAY WHEN TRANSFERRING?

There should not be any fees to transfer the pre-need coming from the new funeral home. There could be some from the original funeral home if specified in a contract signed at the time of making the arrangement.

### WILL I HAVE TO ADJUST TO THE NEW FUNERAL HOMES PRICING?

You should not have to pay any less or more than what your original pre-need contract states. All prices agreed upon at the time of signing the contract with the original funeral home should be honored without any fees or upcharges from the new funeral home.