PRENEED SALES LOG

CERTIFICATE OF AUTHORITY NAME
CERTIFICATE OF AUTHORITY PHYSICAL ADDRESS
CERTIFICATE OF AUTHORITY TELEPHONE NUMBER

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
CONTRACT NUMBER	DATE OF CONTRACT	PURCHASER	BENEFICIARY	NET AMOUNT OF CONTRACT	PIF/INSTL	AMOUNT COLLECTED TO DATE	DATE OF LAST PAYMENT	AMOUNT TRUSTED TO DATE	DATE OF LAST TRUST DEPOSIT	PIF DATE	FACE AMOUNT OF LIFE INSURANCE SOLD	ULTIMATE VALUE OF ANNUITY	PARTIAL DELIVERY YES/NO	DATE OF PARTIAL DELIVERY	DATE CONTRACT FULFILLED	DATE CONTRACT VOIDED OR CANCELLED	DATE OF REFUND	AMOUNT OF REFUND

--Columns are numbered for instructional purposes only.
--Contracts should be listed in numerical order. If there is a gap in the contract numbers, please provide an explanation as to why.
--Date of Contract should always match the date the purchaser signed the contract.
--Purchaser is the person who pays for the interment right(s)
---Beneficiary is the person who will be placed in the interment space at the time of death.
--Net Amount of Contract should always match the net total of the contract.
--PIF/INSTL indicates if the contract is paid-in-full or will be paid in stallments.
--Amount Collected to Date is the total amount of money collected on the preneed contract up to this point. This should be updated when payements are made on a contract.
--Date of Last Payment is the date the last payment was collected on the contract. This should be updated when payments are made on a contract.
--Amount Trusted to Date is the total amount of money that has been deposited into the trust account for the contract. This should be updated each time a deposit is made to the trust account.
--Date of Last Trust Deposit is the date that the last deposit was made to the trust account. This should be updated each time a deposit is made to the trust account.
--PIF Date is the date that the contract is paid-in-full.
--Face Amount of Life Insurance Sold should match the face value of the insurance policy issued for the contract.
--Ultimate Value of Annuity should match the Ultimate Value of the annuity policy issued for the contract.
--Partial Delivery should be marked Yes if certain items on the contract will be delivered prior to need.
--Date of Partial Delivery should reflect the date that the item(s) on the contract were delivered prior to need.
--Date Contract Fulfilled should reflect the date that the contract was fulfilled by the Seller.
--Date Contract Voided or Cancelled is the date a contract gets voided or cancelled for whatever reason.
--Date of Refund is the date the refund was given to the purchaser for the voided or cancelled contracts that are eligible for refunds.
--Amount of Refund should match the refund amount that was given to the purchaser for the voided or cancelled contracts that are eligible for refunds.