



TEXAS SERVICE LIFE INSURANCE COMPANY
PO BOX 341899 * AUSTIN, TEXAS 78734
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CLAIM INSTRUCTION CHECKLIST - PRENEED POLICIES

Texas Service Life Insurance endeavors to process all claims as efficiently as possible. We comply with statutory requirements regarding time deadlines for response to first party insurance claims. **In order to process a preneed claim, we must receive documents listed below.** Additional items may be required in some circumstances. **** PLEASE FEEL FREE TO CALL OUR OFFICE @ (800) 756-7306 BEFORE SENDING CLAIM DOCUMENTS TO VERIFY BENEFIT AMOUNTS AND TO REQUEST FORMS OR INSTRUCTIONS .**

1. **Certified Death Certificate** - must be the original certified document, not a photocopy
2. **Certificate of Performance** – must be signed and dated by a family representative and funeral home representative. The Deceased Insured person is the “Funeral Beneficiary.” The Seller on this and all preneed forms is Lifetime Services, Inc.
3. **Texas Service Life Claimant’s Statement** – Must be fully completed. In the event an insured policy is within the 2-year contestability period, please contact our claims representatives to receive the Contestable Claimant’s Statement and specific instructions.
4. **Original Policy** – if NOT able to return the complete original policy, the beneficiary/claimant must check the box on Claimant’s Statement indicating policy is “**Not Available**” or complete a Lost Policy Affidavit (we will provide form if required)
5. **Death Maturity Assignment** – required in the event the servicing funeral home is not the original contract funeral home
6. **Copy of Final Funeral Statement** (at-need purchase agreement) – **must show signature by family representative and funeral home representative – Disclosure requirements as follows:**
 - **Must itemize all goods and services** provided at-need *exactly* as specified on original contract, including any items on preneed noted as “N/C” or “Incl” with appropriate credit for preneed payments or value on the payment section of the final funeral statement.
 - **Embalming** – must state the **Reason for Embalming** (family request, viewing etc.).
 - **Visitation** – state number of days’ visitation/viewing provided.
 - **“Other” services or items** – must always include description of item or service provided – even if blanks were not filled in on preneed contract.
 - **Casket description** –
***Spell out all descriptive words – material composition of goods must be disclosed:**
 - Exterior:** *20 gauge steel, protective -or- Cloth covered particleboard, non-protective* (Note: the words “wood” and “metal” are not adequate descriptions).
 - Interior:** *velvet, crepe, taffeta, etc.*
 - **Vault or Grave Liner** – must specify “Vault” or “Grave Liner” or “Box” **and material**, i.e., concrete, pine, etc.
 - **Acknowledgement Cards, Prayer Cards etc.** – must always state number of cards provided **All specific goods must be itemized - even on package plan.**
 - **Opening & Closing of grave** – must show name of cemetery, city and state.
 - **Credit for preneed policy value** - must show **Preneed Contract number and Dollar amount on method of payment section of final funeral statement..**
 - **Unpaid balance (to be collected from family)** – balance after credit for preneed policy value - must show dollar amount, --or-- \$00.00 if no balance due. Unpaid balance cannot exceed the family balance due on preneed contract plus cost of extra at-need goods and services not included on preneed contract.