



Our Standards of Service

FUTURA FUNERAL TRUST is committed to providing you and your pre-need customers with superior administrative services. We are pleased to meet or exceed the standards described below in administration of your pre-need accounts.

1. How can funeral directors communicate with *FUTURA FUNERAL TRUST* regarding our requests relating to our consumer's accounts and to get our questions answered?

Kristi Bartel, Trust Officer and Nicole Wachter, Trust Administration Specialist at Fiduciary Partners Trust Company, Trustee, are responsible for the day-to-day administration and are your primary contacts for setting up new accounts or additions, handling payouts, and any other questions or matters that we can assist you with. To maximize your access to answers and provide you with flexible communication alternatives, we have established several methods for you to communicate with us:

- Feel free to call the direct toll-free **phone number: 855-408-9285**
- You may fax account documents, such as payout claims or other information to **fax number: 920-882-4283**
- You can send information and requests to the following **email address: ift@futurastrust.com**
- Information, including forms and instructions, are available with the "Resource Center" tab on the following **website: www.futurastrust.com**

We will respond to your requests or questions within one business day. Should you have questions regarding the trust investments, please contact John Swift, CFA®, CPA, who is the Chief Investment Officer for the Futura Funeral Trust at **312-259-9595**.

2. When can funeral directors expect to receive funds for death payouts and other contract withdrawals?

We understand that you invest a great deal in the services you provide and it is important to receive the trust proceeds as soon as possible. We offer payment through electronic transfer (ACH) to eliminate mailing delays. Upon receipt of withdrawal documentation, prior to 3:00 PM, your funds will be mailed/transferred to your account on the following business day.

3. How can funeral directors determine and lock in the amount to be paid for our customer's account?

You may check your account balances on our on-line access system. For help getting started and logging on, please contact us. You are also welcome to call and balance information can be provided over the phone. If a beneficiary is deceased and you wish to lock in their account balance pending our receipt of the appropriate payout documentation, we can sell the accounts' investments to freeze the account value. Please notify us by 3:00 PM with a *Request to Lock form*. This can be downloaded from our website listed above. A copy will be returned to you confirming the account value.

4. How soon will new pre-need trust funds that funeral directors send to the trust be deposited, invested, and acknowledged?

Funds that we receive for deposit to your consumers' pre-need accounts are deposited to our trust, posted to our accounting system, and invested on the second business day following the day they are received at our office. On the Friday after deposit, we will print and mail to you and your pre-need fund purchase a computer transaction statement that will reflect the deposit and investment of the funds received, along with an enclosure letter.