

## **Tax and Trust Contract Disclosure Statement**

I understand that (according to the Internal Revenue Service) the **purchaser** of a preneed funeral contract **is responsible for the income tax** on the interest earned on the funds trusted for the preneed contract.

I also understand that the interest remains with the trust and cannot be removed unless the contract is revoked (only with a revocable contract).

Signature \_\_\_\_\_ Date \_\_\_\_\_

Witness \_\_\_\_\_ Date \_\_\_\_\_