

# MY PPS BEREAVEMENT FUND<sup>SM</sup>

|  |           |
|--|-----------|
| 1. Funeral/Cremation Services                          | \$        |
| 2. Cemetery/Disposition Costs                          | \$        |
| 3. Family Gathering/Reception Allowance                | \$        |
| 4. Current Monthly Expenses x 3 months (minimum)       | \$        |
| 5. Pet Care  | \$        |
| 6. Anticipated Legal Fees Handling Estate Transactions | \$        |
| 7. Anticipated Taxes                                   | \$        |
| 8. Unexpected Medical Bills                            | \$        |
| 9. Legacy Gift to Loved Ones                           | \$        |
| 10. Donation to Charitable/Religious Organization      | \$        |
| 11. Other  | \$        |
| <b>TOTAL</b>   | <b>\$</b> |

Standard Issue     Guaranteed Issue    Age    Single Premium Option \$

## Payment Plan Options    Monthly    Quarterly    Semi-Annual    Annual

**3-Year**    \$    x 36 months = \$    - \$    = \$  
Total Premiums    Trust Amount    Insurance Fees over Policy Period

\$    Insurance Fees    ÷ 3 years = \$    ÷ 12 months = \$  
Annual Insurance Fees    Monthly Insurance Fees

**5-Year**    \$    x 60 months = \$    - \$    = \$  
Total Premiums    Trust Amount    Insurance Fees over Policy Period

\$    Insurance Fees    ÷ 5 years = \$    ÷ 12 months = \$  
Annual Insurance Fees    Monthly Insurance Fees

**7-Year**    \$    x 84 months = \$    - \$    = \$  
Total Premiums    Trust Amount    Insurance Fees over Policy Period

\$    Insurance Fees    ÷ 7 years = \$    ÷ 12 months = \$  
Annual Insurance Fees    Monthly Insurance Fees

**10-Year**    \$    x 120 months = \$    - \$    = \$  
Total Premiums    Trust Amount    Insurance Fees over Policy Period

\$    Insurance Fees    ÷ 10 years = \$    ÷ 12 months = \$  
Annual Insurance Fees    Monthly Insurance Fees

Prepared by (print name)

Phone Number

Agent License Number