

Montana Funeral Trust

A partner of



June 25, 2021

Dear Member Funeral Home,

We are pleased to announce new options for death certificate submissions to Montana Funeral Trust beginning Monday, July 12th, 2021. These enhanced options continue to ensure our compliance on multiple levels and ensure prompt payment to your firm.

Revised Options for Death Certificate Submissions to Montana Funeral Trust

You may begin using the option(s) that work best for your firm on Monday, July 12th.

Electronic Submission:

- Call or email Montana Funeral Trust (mft@montanafuneraltrust.org) to request that a secure (NeoCertified) email containing our **newly revised General Administration form** be sent.
- Complete the General Administration form, review the indemnification, check box and sign to agree.
- Attach/upload the completed General Administration form along with a copy of the **Certified Death Certificate** to the secure email. Please provide the Burial Permit if available.
- Email the claim to Montana Funeral Trust.

Mail Submission:

- Complete our **newly revised General Administration form**, review the indemnification, check box and sign to agree. Enclose a copy of the **Certified Death Certificate** and burial permit (if available) and mail to Montana Funeral Trust.

-Or-

- Complete our **newly revised General Administration form**, review the indemnification, check box and sign to agree. Enclose a **Certified Death Certificate with an official seal** and mail to Montana Funeral Trust. Montana Funeral Trust will continue to return Certified Death Certificates with an official seal along with the payment or the firm's weekly direct deposit report.

You can find the newly revised **General Administration form** enclosed.

Montana Funeral Trust will continue to have a same-day processing policy in place for death claims received Monday-Friday by 9:30 am MST (excluding US holidays, and the first business day of each month). Please be advised that if the account has a pending payment, we are required to hold the death claim in a pending status until the recent payment clears (10 days).

We hope that this update to our day-to-day operations will offer more flexibility to your firm. This enhancement remains in line with our overall commitment to security, and compliance. Please contact us with any questions at 844.206.0049 or mft@montanafuneraltrust.org.

In partnership,

Melissa Sargalis
Director of Preneed Trust Services



The Montana Funeral Trust is a Montana Trust administered for the Montana Funeral Directors Association by Funeral Director Support Services, Inc.

General Administration Form

For Existing Montana Funeral Trust Accounts

GENERAL INFORMATION (This section must be completed in its entirety; failure to do so could delay processing.)

Date of Request: ____/____/____ Consumer Account Number: _____

Taxpayer Account SS#: XXX - XX - _____

Beneficiary's Name: _____

Purchaser's Name: _____

Mortuary Account #: _____ Mortuary Name: _____

DEATH PAYMENT / REFUND REQUEST

☐ Death Payment

Request for death payments must be accompanied by a:

1. Certified Death Certificate or a copy of the Certified Death Certificate
2. Burial Permit if Available

Please review the following indemnification statement and check the box below if in agreement.

☐ I hereby warrant and represent that I am providing a true and accurate copy of a valid death certificate filed with and through Montana State or an equivalent State Death Registration System. I further agree to indemnify and hold harmless New York State Funeral Directors Association, Inc., Funeral Directors Support Services, Inc. and Montana Funeral Trust, their officers, directors, trustees, employees and their affiliates and their respective successors and assigns against any loss, liability, claim, damage and expense whatsoever arising out of or based upon any false representation, warranty, breach or failure made by me or in any other document furnished by me to any of the foregoing in connection with this transaction.

Funeral Director's Name: (Print) _____

Funeral Director's Signature: _____

☐ Full Refund

Full and partial refunds must be accompanied by a

1. Notarized Purchaser Request for Refund
2. Power of Attorney OR Legal Guardian Paperwork (If signed by the legal guardian or power of attorney of the original purchaser)

☐ Partial Refund: Amount Requested \$ _____

ADDITIONAL DEPOSITS

Amount: \$ _____

If the check is made payable to the mortuary on the front, the mortuary must endorse the back of the check and write the words "Pay to the order of The Montana Funeral Trust".

CORRESPONDENCE ADDRESS

Please mail all future account statements to:

Name: _____

Street Address: _____ Apt./Suite _____

City: _____ State: _____ Zip: _____

Phone: () _____