



**Ecclesiastical**  
PLANNING SERVICES

# Funeral Plan Application Form

**Please send the original signed copy to Ecclesiastical Planning Services and give a copy to your customer.**

Ecclesiastical Planning Services, Beaufort House, Brunswick Road, Gloucester, GL1 1JZ.

**Tel: 0800 633 5626** Fax: 0345 601 0471 Email: [info@epsfunerals.com](mailto:info@epsfunerals.com)

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Please complete this form clearly in black ink and in BLOCK CAPITALS

### Person to be covered by the plan

Title Mr / Mrs / Miss / Other ..... Surname .....  
First name(s) ..... Date of birth ..... / ..... / .....  
Address .....  
Postcode ..... Tel. no. ....

### Joint name (if applicable)

Title Mr / Mrs / Miss / Other ..... Surname .....  
First name(s) ..... Date of birth ..... / ..... / .....  
Address .....  
Postcode ..... Tel. no. ....  
I/We wish this plan to pay out on:  First death **OR**  Second death

### Planholder or purchaser's details (if different to the above)

Title Mr / Mrs / Miss / Other ..... Surname .....  
First name(s) ..... Date of birth ..... / ..... / .....  
Address .....  
Postcode ..... Tel. no. ....

### Next of kin, executor or personal representative's details

Title Mr / Mrs / Miss / Other ..... Surname .....  
First name(s) .....  
Address .....  
Postcode ..... Tel. no. ....

### Correspondence instructions

Please send correspondence to:  
 The person covered by the plan  The planholder or purchaser  Other (please specify)  
.....

## Funeral arrangements (please provide as much detail as possible)

Note to customer(s): This form captures personal data which may include 'special category data'. Please see our data protection information in the 'To be completed by the customer(s)' section.

Funeral type:  Burial  Cremation

Service:

Separate service before crematorium/cemetery Location .....

Service at crematorium/cemetery chapel Location .....

Coffin/casket description (full description of coffin/casket, lining and dressing gown chosen, please avoid brand names)

.....  
.....  
.....

Faith or denomination (if applicable) .....

Preferred minister or officiant (if known) .....

Hymns or music requested (if known) .....

Donations in lieu of flowers (please name the nominated recipient)  
.....

Newspaper notice(s) (please state publication name) .....

Grave details (if applicable):

New  Existing (please provide identification details)

Location ..... Grave/Deed no. ....

Cremated remains (if applicable):

Instructions for ashes .....

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## Plan name

Plan name: .....

Personal Plan

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## Cost breakdown for Personal Plans and any additional instructions (optional section)

This section must be completed for Personal Plans.

### Funeral director's charges

Professional services £.....

Collection of deceased within .....  
miles of the funeral director's premises £.....

Hearse £.....

..... limousine(s) £.....

Coffin £.....

Other: ..... £.....

Other: ..... £.....

Other: ..... £.....

**TOTAL (A) £.....**

### Contribution towards third party costs

Doctors' cremation certificates £.....

Crematorium fees £.....

Cemetery fees £.....

Church/Clergy fees £.....

Newspaper notices £.....

Flowers £.....

Other: ..... £.....

Other: ..... £.....

**TOTAL (B) £.....**

## Plan price

Total funeral director's charges (A) £.....  
Contribution towards third party costs (B) £.....  
Management fee (C) £.....  
TOTAL (A+B+C) £.....

## Payment options

(Please make cheques payable to EPS)

Cheque  BACS

Card payment

For card payments, please call  
0800 633 5626.

## Notes

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## To be completed by the customer(s)

**Data Protection** – Ecclesiastical Planning Services (as the data controller) will always act responsibly with your data. We will process your personal data, which may include 'special category data' such as religion, in accordance with the applicable data protection law and on the legal basis that is necessary to set-up, administer and carry out your funeral plan, and for business management purposes. We will also share your data with the whole of life assurance policy provider to which your plan is linked, administrative functions within the Ecclesiastical Group and your selected funeral director in order that they can carry out the plan when the time comes. If data processing takes place outside the European Economic Area, we will make suitable arrangements for your personal information to be protected. You can withdraw your consent to us holding your data but this may mean we are unable to carry out your funeral plan. For further information on how we manage data responsibly, please refer to our Privacy Policy at [www.funeralplans.co.uk/ecclesiastical-privacy-policy](http://www.funeralplans.co.uk/ecclesiastical-privacy-policy) or contact our Data Protection Officer at the address on the front of this form or on 0345 607 3274.

- Please tick to confirm that you give your consent for us to hold and process 'special category data'.  
 If you have provided personal data of others, for example for a beneficiary, next of kin or executor, please tick to confirm that you have their consent for us to hold and process their personal data on this application form.

Please read the Funeral Plan Terms and Conditions and let us know if you have any questions. Please sign below to confirm you have read, understood and accept the Funeral Plan Terms and Conditions and that the details on this Application Form are correct.

Signed ..... Date .....

Signed ..... Date .....

## To be completed by the funeral director

ID ref. no. ....

Name of contact ..... Tel. no. ....

Name of firm .....

Address .....

..... Postcode .....

I confirm acceptance of the details within this application and undertake to fulfil all services under this plan in accordance with the Funeral Plan Terms and Conditions and in line with a recognised industry Code of Practice. I confirm that to the best of my knowledge all information supplied is correct and that the customer has completed the data protection tick boxes above.

Signed ..... Date .....

# Funeral Plan

## Terms and Conditions

### 1. General

Ecclesiastical Planning Services Limited ('us', 'we' or 'our') operate the Funeral Plan (the 'Plan'). The Plan allows you to arrange and make financial provision for your own or another's funeral before death occurs. These Terms and Conditions apply to the Plan and form a binding contract between you and us along with the Application Form. In these Terms and Conditions:

'Application Form' is the form you complete when applying for the Plan;

'Certificate of Entitlement' is the certificate provided to you by us confirming that you hold the Plan;

'Charges' means the charges for the Plan agreed to by you on signature of your Application Form;

'Management Fee' means the amount specified as such on the Application Form;

'Plan Growth' is the growth of the Plan from the date funds are first paid to us until the Plan Value is applied at the time of death;

'Plan Value' is the value of the funds held in the Plan; and

'you' or 'your' is the holder and/or beneficiary of the Plan or your personal representative (as applicable).

### 2. Taking out a Plan

- 2.1 You choose the style, cost and type of funeral required and apply for a Plan by completing and sending the Application Form to us with payment of the Charges.
- 2.2 By sending an Application Form and payment of the Charges, you confirm that the information in the Application Form is correct, you accept these Terms and Conditions and that you wish to enter into a binding contract with us to provide you with the Plan.
- 2.3 If we accept your application (and we reserve the right not to) we will send you a Certificate of Entitlement confirming your Plan. Our acceptance of your Application Form forms the binding contract between you and us.
- 2.4 Keep your Certificate of Entitlement in a safe place as it will be needed when making funeral arrangements. We recommend that you let your next of kin know where you keep your Certificate of Entitlement.
- 2.5 If you lose your Certificate of Entitlement, or other relevant papers, you can obtain copies from us, however we may charge for replacement.

### 3. Your Plan

- 3.1 We will provide the items and services set out in your Application Form and any accompanying Plan details subject to the provisions in these Terms and Conditions. Any upgrades or extra services that you ask for or need (for example, if you die abroad) will be charged to your personal representatives by the funeral director. In such cases we will carry out our obligations under the Plan as far as possible as long as your personal representatives have confirmed their liability for any extra expense.
- 3.2 Your Plan may include an allowance towards third party charges. Third party charges are all external payments which are outside the control of the funeral director. Such allowance is guaranteed not to reduce in value and will reflect any Plan Growth, but if third party charges are higher than the allowance and the Plan Growth, then you or your representatives must pay the balance.
- 3.3 If your Plan does not include an allowance towards third party charges these must be paid in full when the funeral is carried out.
- 3.4 If you die overseas and are repatriated to the UK we will carry out our obligations under the Plan. If you are not repatriated the Plan will be cancelled and you will be refunded as if you had cancelled under Clause 7.2.
- 3.5 You can make changes to your Plan at any time after full payment. You may need to pay more if you upgrade your Plan or include extra products or services. We will tell you of any extra costs or refer you to the funeral director.
- 3.6 We will not be liable to arrange or pay for a funeral unless the Certificate of Entitlement is produced and the funeral is carried out by a funeral director as specified in Clause 4.

### 4. The funeral director

- 4.1 The funeral director appointed when you submitted your Application Form will normally conduct your funeral.
- 4.2 If you move to a different area we will help you find an alternative funeral director to conduct the funeral. You may be required to pay an additional sum when local costs are more expensive in the area you have moved to.
- 4.3 We will also help you find an alternative funeral director to conduct the funeral should the appointed funeral director cease to trade before your funeral has been conducted. In such cases

we will try to appoint another funeral director without asking for an additional payment from you although we cannot guarantee this.

- 4.4 With reference to Clauses 4.2 and 4.3, if we cannot appoint an alternative funeral director we will pay the Plan Value at the time of death to a funeral director that is chosen by you or your personal representatives. In this case the funeral director may request an additional payment from you or your personal representatives.

## **5. The service**

- 5.1 Any details provided in the Plan literature are designed to give a general description of the services and goods to be supplied. We will not be liable for any change in specification but goods and services will be of an equivalent quality and suitability.
- 5.2 The appointed funeral director will carry out the funeral in line with recognised best practice and to the highest standards in accordance with a recognised industry Code of Practice.
- 5.3 Third parties will provide some of the services detailed in the Plan (e.g. a crematorium). While we (via the funeral director) will use all due care in the use of such services we cannot accept responsibility for any failure by such third parties to meet any particular standard.

## **6. Plan funds**

- 6.1 The Charges (other than the Management Fee) will be used to buy a whole of life assurance policy. The whole of life assurance policy will be owned by us for the purpose of providing the funeral. The Plan ensures that the funds will be available to pay the funeral director without further recourse to you or your personal representatives (subject to the provision of these Terms and Conditions). We will effect the whole of life assurance policy with a life assurance company that is authorised by the Prudential Regulation Authority (PRA) and regulated by the PRA and the Financial Conduct Authority.
- 6.2 By holding the funds in a whole of life assurance policy the Plan meets the requirements of Article 60(1) (a) of the Financial Services and Markets Act 2000 (Regulated Activities) Order 2001.

## **7. Right to cancel and refunds**

- 7.1 You may cancel the Plan within 30 calendar days of signing the Application Form. We will refund all payments made to us in full. This does not affect any applicable statutory consumer rights.

- 7.2 If you cancel the Plan after 30 days, the amount of refund payable will be all payments made by you to us less the Management Fee as specified in your Application Form.

- 7.3 Once a Plan is cancelled, we will have no liability under these Terms and Conditions.

- 7.4 You may only cancel your Plan by writing to us at our registered address.

## **8. Other**

- 8.1 At present, in the United Kingdom, the costs of providing a funeral are not subject to Value Added Tax (VAT). If VAT becomes payable on funeral expenses we reserve the right to recover this cost from you or your personal representatives.
- 8.2 The Plan is personal to you and cannot be transferred.
- 8.3 We will send any correspondence to whoever has been selected to receive it at the address shown on the Application Form, unless a change of address has been notified to us.
- 8.4 You must notify us if you change your usual place of residence.
- 8.5 These Terms and Conditions are subject to English law and you and we submit to the exclusive jurisdiction of the Courts of England and Wales for the resolution of any dispute arising from them.
- 8.6 We reserve the right to change the Terms and Conditions from time to time, for example if VAT rules change. We will notify you of any changes that affect you.

## **9. Complaints**

- 9.1 If you have any complaint regarding the quality of the service or the items supplied in connection with a Plan, you must contact the appointed funeral director and send a copy to us at our registered address.
- 9.2 If you have a complaint about us, please contact us on 0800 633 5626 and we will deal with the complaint under our written complaints procedure. If we cannot resolve your complaint you may then refer it to The Funeral Planning Authority by calling 0845 601 9619. We are a Registered Provider of Funeral Plans and comply with the Rules and Code of Practice of the Authority. [www.funeralplanningauthority.co.uk](http://www.funeralplanningauthority.co.uk).