



## PURCHASE AGREEMENT FOR FUNERAL PLANNING AND CONCIERGE SERVICE

### 1 Client Information

*(Please Print)*

1 \_\_\_\_\_  Male  Female \_\_\_\_\_  
 Client's Name Date of Birth

2 \_\_\_\_\_  Male  Female \_\_\_\_\_  
 Client's Spouse's Name Date of Birth

3 (     ) \_\_\_\_\_  
 Phone Number

4 \_\_\_\_\_  
 Residence Address City State Zip Code

### 2 Payment Options

#### ► Option A – Annual Fee

**To be eligible for this option, Client must be age 80 or younger and be able to answer NO to the following questions. If a spouse is added, he/she must also be age 80 or younger and able to answer NO to the following questions.**

Qualification for Option A is based on a contract of trust. By signing this Agreement, you affirm that your answers below are truthful.

1. Have you been advised that you have a terminal illness?
2. Are you currently confined to a long-term care facility or are you receiving or have you been advised to receive hospice care?
3. Are you currently bedridden, receiving oxygen, or using a wheelchair, motorized chair, or walker for mobility?
4. Have you been treated for heart disease or cancer during the past year?

Client	Spouse
<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO

- Individual – \$48/year plus a one-time enrollment fee of \$95
- Individual *plus Spouse* – \$68/year plus a one-time enrollment fee of \$95

**Payment accepted via credit card only.**

#### ► Option B – One-Time Payment for Lifetime Service

**There are no age or health qualifications to be eligible for this option.**

- Individual – \$495
- Individual *plus Spouse* – \$695

**Payment accepted via credit card or personal check.**

### 3 Buyer Information *(The Buyer is the person responsible for payment.)*

- Client named in Section 1 is the Buyer.
- Client named in Section 1 is not the Buyer. Buyer information:

Buyer's Name	(    )	Buyer's Phone
Buyer's Residence Address	City	State      Zip Code

### 4 Preferred Payment Method *(Please select one payment method)*

**Payment by Check:**

- Check attached for one-time fee of \$495
- Check attached for one-time fee of \$695

**Payment by Credit Card:**

- |  |   |
|--|---|
| <input type="checkbox"/> One-time fee of \$495 | <input type="checkbox"/> \$48/yr plus one-time enrollment fee of \$95 |
| <input type="checkbox"/> One-time fee of \$695 | <input type="checkbox"/> \$68/yr plus one-time enrollment fee of \$95 |

I authorize the Service fee based on the Payment Option selected to be charged to the following charge card. I understand that if I wish to discontinue this authorization or if my credit card number changes, or if my credit card expires, I will notify in writing Everest Funeral Package, LLC.

**Type of Card**

- MasterCard    Visa (choose one)   Expiration Date \_\_\_\_\_

Credit Card Number

Name of Cardholder \_\_\_\_\_ Signature \_\_\_\_\_

### 5 Notice / Acknowledgment

Everest Funeral Package, LLC ("Seller") is located at 1300 Post Oak Blvd., Suite 1210, Houston, TX 77056, 1-800-913-8318.

Buyer agrees to purchase funeral planning and concierge services (the "Service") from Seller. Buyer acknowledges that he/she has reviewed the description of the Service at [www.everestfuneral.com](http://www.everestfuneral.com) or in a brochure provided by Seller, and Buyer agrees to purchase the Service as described therein.

Buyer agrees to make the payments indicated under the Payment Option selected in Section 2 of this Agreement. Buyer's first payment will be charged to Buyer's account (see Section 4) within 30 days after the date of this Agreement. Annual payments under Option A will be charged to Buyer's credit card on or around the anniversary date of this Agreement. Buyer understands that Buyer is under no obligation to continue making payments under this Agreement and that if you stop making payments under Option A, Everest Funeral Package, LLC will be under no obligation to provide any additional services to Client(s) or to refund any money Buyer has previously paid. If a payment cannot be charged to Buyer's account within 30 days of its due date, Buyer will be deemed to have cancelled this Agreement.

**Buyer's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### 6 Return Purchase Agreement

▶ Reminder: Sign and date the Purchase Agreement in Section 5	
<b>By Mail</b> Everest 1300 Post Oak Blvd, Suite 1210 Houston, TX 77056	<b>By Fax</b> 713-993-0063

Agent Name \_\_\_\_\_ Agent I.D. \_\_\_\_\_