



TRUST SOLUTIONS

Funeral Services, Inc.

P. O. Box 13407, TALLAHASSEE, FLORIDA 32317 / 1.800.749.1340

FSI's eServices: We're Here to Help

If families are uncomfortable or unwilling to come to your firm to make arrangements, the following are a few solutions that have proven to work.

- Paper contracts with eSign
- ACH & Other Features
- Fillable contract app with eSign

A Word About Electronic Signatures and Regulatory Compliance

Electronic Signatures (eSign)

Electronic signatures are a legally accepted means of signing documents and contracts in most every state. There are several free programs and apps that allow you to send documents via email, have the recipient electronically sign the document and return to you via email. Many people use the free version of Adobe Acrobat Reader® to review and sign documents. Acrobat Reader may be downloaded at the following link:

<https://get.adobe.com/reader/>

Best Practices, the General Price List (GPL)

The FTC Funeral Rule was written before the internet became a necessary tool to operate in today's business world. Therefore, *electronic* delivery of the GPL was never contemplated by the rule. When making arrangements by telephone or video conference, best practices should include the delivery of the GPL, via email, to the consumer before the discussion of goods, services, prices or types of services available.

Currently Available Options

Scan Paper Contracts Using eSign

- Complete the atneed or preneed contract.
- Scan and email the contract (all pages, front and back) to the consumer with instructions on how to electronically sign the contract and to return to you once they've electronically signed.
 - You may want to add the Adobe Reader® link above in your instructions to the family.
- After receiving the signed contract from the family, if it is a preneed contract, print a copy of the electronically signed contract and staple it to the original paper contract.
- Process as usual.

ACH & Other Features NOW Available

- Scheduling of one-time or recurring preauthorized debit (PAD) payments at www.FSItrust.com
- Posting of one-time or recurring credit card payments at www.FSItrust.com
- One-time preauthorized debit or one-time credit card payments may now be scheduled from eContract

www.FSItrust.com

Compliance • Convenience • Speed • Technology • Security



- Secure upload of contracts and other documents at www.FSItrust.com

New Features to be Available Soon

Fillable Contracts Using eSign

FSI is creating fillable contracts for types 16,17,18,19 in Adobe Acrobat®. These should be available the first week of May.

- Using the next available blank FSI paper contract, type the blank contract number on to the fillable contract (remember: all contracts numbers must be accounted for) and complete and electronically sign the fillable preneed contract.
- Email the contract file to the family with instructions on how to how to electronically sign the contract and to return to you once they've electronically signed.
 - You may want to add the Adobe Reader® link above in your instructions to the family.
- After receiving the returned, signed contract from the family, print a copy of the electronically signed contract and staple it to the blank paper contract – ensure BOTH contracts have the same contract number.
- Write “Electronically Completed” across the blank contract.
- Process as usual.

We're here to help. Please contact us anytime at 850.425.1340 or at clientservices.fsitrust.com