

ADDENDUM C
Claim Recommendations -- Preneed Consumer Protection Trust Fund
Board of Funeral, Cemetery and Consumer Services

Date of Board Meetin 3/7/2024

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These are claims against the Preneed Consumer Protection Trust Fund, under s. 497.456, Fla. Statutes. The Division has reviewed these claims and recommends approval in the amounts stated below ("Amount recommended") (which in some cases may be zero -- i.e., deny

Clm#	Claimant	Beneficiary (decedent	Defaulting Seller	Amt claimed	Amount recommended	Reduction code(s)
CPTF-2326	Angrist, Gregory	Angrist, Barbara	Grossberg Hebrew Memorial Chapel	\$1,585.00	\$660.00	4
CPTF-2284	SW Florida Funeral & Cremation Services	Baron, Carl	ICS Cremation Society, Inc	\$795.00	\$230.50	4
CPTF-2433	BERTRAM, CHARLES	BERTRAM, CHARLES	ICS Cremation Society, Inc	\$795.00	\$795.00	
CPTF-2434	BERTRAM, DONNA	BERTRAM, DONNA	ICS Cremation Society, Inc	\$795.00	\$795.00	
CPTF-2387	Cramer, Dean	Cramer, Dean	ICS Cremation Society, Inc	\$1,490.00	\$1,040.00	16
CPTF-2293	Herr, Mary	Herr, Mary	ICS Cremation Society, Inc	\$995.00	\$995.00	
CPTF-2428	Jackson, Valada Jean	Jackson, Valada Jean	ICS Cremation Society, Inc	\$1,115.00	\$795.00	16

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Clm#	Claimant	Beneficiary (decedent	Defaulting Seller	Amt claimed	Amount recommended	Reduction code(s)
CPTF-2313	Veterans Funeral Care Inc.	Lersch, Jean	Global Mortuary	\$350.00	\$350.00	
CPTF-2384	Paruta, Regina	Paruta, Maria	ICS Cremation Society, Inc	\$2,929.00	\$595.00	6
CPTF-2312	Veterans Funeral Care	Stranger, Martha	Global Mortuary	\$855.00	\$855.00	
CPTF-2435	SZURMA, GERALDINE	SZURMA, GERALDINE	NATIONAL ALL FAITH FUNERALS CORP (Changed to: COVENANT MORTUARY)	\$560.00	\$560.00	
CPTF-2294	Baldwin, Neil	Wallace, Clifford	ICS Cremation Society, Inc	\$695.00	\$795.00	8
CPTF-2432	WALLACE, DAVID	WALLACE, DAVID	ICS Cremation Society, Inc	\$1,245.00	\$825.00	16

Consumer Protection Trust Fund - Administrative Report	
Preneed Funeral Contract Consumer Protection Trust Fund Balance as of: February 14, 2024	\$9,587,878
# Claims Presented at This Board Meeting	13
\$ Claims Presented at This Board Meeting	\$9,290.50
Claims Paid as of February 14, 2024 (for fiscal year 2023-2024)	\$67,968.34
Quarterly Remittances paid as of February 14, 2024 (for fiscal year 2023-2024)	\$436,024

Claim Recommendations-Preneed Consumer Protection Trust Fund Reduction Code	
NIA	Not applicable (no reduction)
1	Claim included cash advance items (CAI) in excess of amount of CAIs in the preneed contract.
2	Claimant not able to verify payment of entire preneed or at-need contract price.
3	Claimant received interest on trust funds (reduce claim by amount of interest).
4	Claim reduced by amount of trust funds available.
5	Insurance-funded preneed contract. Claim reduced by amount of insurance funds available.
6	Claim includes charges by at-need provider for good/services not included under the preneed contract.
7	Claimant requested more than amount paid on the preneed contract.
8	Claimant requested less than amount paid on the preneed contract.
9	Claimant was overpaid by the family's representative.
10	Claimant has billed the family's representative for the outstanding amount.
11	Amount of claim plus amount already disbursed by trustee exceed amount paid for preneed contract.
12	Claim denied based upon the amount available in the trust fund.
13	Partial refund by seller.
14	Partial refund through Settlement Agreement.
15	Amount of claim plus amount already disbursed by the Consumer Protection Trust Fund exceed amount paid for preneed contract.
16	Claim includes burial spaces and other non-refundable items in excess of the preneed contract amount.