

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

Date of Board Meetin 9/2/2021

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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-1925	SW Florida Funeral & Cremation Services	Bailey, Kenneth B	ICS Cremation Society, Inc	\$695.00	\$0.00	4
*****						
CPTF-1917	Granato (Jr), Albert R	Granato (Jr), Albert R	ICS Cremation Society, Inc	\$1,245.00	\$795.00	16
*****						
CPTF-1918	Granato, Ann G	Granato, Ann G	ICS Cremation Society, Inc	\$1,245.00	\$795.00	16
*****						
CPTF-1916	DOZIER, PATRICIA Y	JACKSON, ROBERTA D	Zion Hill Mortuary Inc	\$3,842.00	\$1,864.69	
*****						
CPTF-1926	SW Florida Funeral & Cremation Services	Johnson, Doris Jean	ICS Cremation Society, Inc	\$795.00	\$795.00	
*****						
CPTF-1920	Johnson, Dorothy Ann	Johnson, Dorothy Ann	ICS Cremation Society, Inc	\$795.00	\$795.00	
*****						
CPTF-1921	Johnson, George Albert	Johnson, George Albert	ICS Cremation Society, Inc	\$795.00	\$795.00	
*****						

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CPTF-1927	SW Florida Funeral & Cremation Services	Owlett, Franklin D	ICS Cremation Society, Inc	\$995.00	\$995.00	
CPTF-1928	SW Florida Funeral & Cremation Services	Pagan-Lugo, Marilyn	ICS Cremation Society, Inc	\$833.00	\$833.00	
CPTF-1922	Romero, Jose Valerio	Romero, Orquidea	Funeraria Nacional Sur Corporation	\$4,628.00	\$3,291.41	4

Consumer Protection Trust Fund - Administrative Report	
Preneed Funeral Contract Consumer Protection Trust Fund Balance as of: July 22, 2021	\$9,337,676
# Claims Presented at This Board Meeting	10
\$ Claims Presented at This Board Meeting	\$10,959.10
Claims Paid as August 16, 2021 (for fiscal year 2021-2022)	\$23,197.75
Quarterly Remittances paid as of August 16, 2021 (for fiscal year 2021-2022)	\$21,098

	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.