

Interface Financial Planning Ltd.

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Mr T Tester
19 Pains Close
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1st August 2022

Dear Tommy

Re: Your request for us to arrange a Funeral Plan on your behalf

At our recent meetings you requested that we research and advise you regarding the provision of a funeral plan for yourself. We discussed your requirements in detail over several exchanges including meetings, emails, and phone calls and a copy of your completed demands and needs is enclosed. Based in the requirements that you have requested we recommend that you take out a plan with XYZ Funeral Plans because they offer the services that you want, and the cost is within your level of affordability. They are also able to nominate a local funeral director who you know well, and your family has used previously.

The documentation for the plan is enclosed which I recommend that you study carefully. Please come back to me and ask me if you have any queries or if there is anything that you do not understand. If you wish you can also get in touch with *XYZ funeral plans* who will be able to provide you with further information and resolve any queries.

In addition, some people like to contact the nominated funeral director and some of them like to visit. My mother did exactly that and was very happy that I had arranged her funeral plan. I am happy to report that me and my sister were very pleased with that funeral director's service and the execution of her funeral plan ten years later when my mother passed on. You can read about her and see her photo on our website at [Funeral Planning - Interface Financial Planning](#)

You have stated your preference to pay for the plan by one lump sum because you do not like instalment plans, and you do not need to pay by instalments. We have assessed your affordability and we can see that you can easily afford to pay this amount. If you would like to proceed, please sign the enclosed application form and return it to us with payment using the enclosed business reply envelope. I strongly recommend that you complete the enclosed Funeral Wishes form and return it with your application however from many years' experiences I know that some people like to take their time with this form, and you can send this form later if you wish.

Please note that Funeral Plans are now regulated by The Financial Conduct Authority which provides you with additional protection. The new regulation means that commission is no longer paid to us when we provide you with a funeral plan. We discussed our fee for researching, advising, and arranging this plan and you agreed that a fee of £250 was acceptable and our invoice is enclosed.

Yours sincerely
Mr Alan Moran

Enclosed

1. Your demands and needs stating your requirements
2. Personalised quotation from Funeral Plan Provider
3. Plan details and product features
4. Instructions for Next of Kin
5. Funeral Wishes form for completion and submission with application
6. Product details including Definitions, what the plan covers, what the plan does not cover, general procedures, & cancellation
7. Our Invoice for settlement