



December 18, 2024

Mrs. Su Zi
9030 SE 170th Ave
Ocklawaha, FL 32179

RE: Agreement #317-8013719

Dear Mrs. Su Zi,


On behalf of the support staff, management and the entire Roberts family, I wanted to say "Thank you" for the trust and confidence you have placed with our locally owned and family operated funeral home. With over 160 years of combined professional experience helping our community, you can rest easy knowing each and every member of our team is passionately dedicated to the service of others in their time of need.

Please allow this letter to serve as written confirmation that your arrangements have been received and accepted by our firm.

We have taken the liberty of including Emergency Record Cards for your pre-arrangement purchase. Should you need additional cards or copies of your agreements or have any further questions, simply give us a call at 352-537-8111.

At Roberts of Ocala, it is always an honor and our privilege to assist you and your family with your funeral, cremation and memorialization needs.

Respectfully,



Stephen L. Solomon
Family Care Manager
Roberts of Ocala Funerals & Cremations

Enclosure: Emergency cards

EAST CHAPEL | 352.732.9944
2739 SE Maricamp Road
Ocala, FL 34471

DOWNTOWN CHAPEL | 352.537.8111
606 SW 2nd Avenue
Ocala, FL 34471

WEST CHAPEL | 352.854.2266
6241 SW State RD 200
Ocala, FL 34476

info@robertsfunerals.com | www.robertsfunerals.com

Attachment D Funeral Documentation
PREARRANGED TRUST FUNDED FUNERAL AGREEMENT

317-8013719

FIRM INFORMATION

Roberts of Ocala Funerals and Cremations
606 SW 2nd Ave
Ocala, FL 34471
(352) 537-8111
License# F459068

PURCHASER INFORMATION

Mrs Su Zi
9030 SE 170th Ave
Ocklawaha, FL 32179

Sex: Female

Relationship To Beneficiary: Self
Email: x.suzi@live.com

BENEFICIARY INFORMATION

☐ Check box if same as Purchaser

Mrs Su Zi
9030 SE 170th Ave
Ocklawaha, FL 32179

Sex: Female

Email: x.suzi@live.com

GUARANTEED / NON-GUARANTEED STATEMENT OF FUNERAL GOODS AND SERVICES SELECTED

Unless indicated by an * the prices for Services and Merchandise are not guaranteed. The prices for Cash Advance Items are not guaranteed. For all items for which the prices are non-guaranteed, the current retail price of those items, at Maturity, will be charged and must be paid for prior to the provision of the Services and Merchandise.

Services

Care and Preparation of Remains
Washing & Disinfecting of Un-Embalmed Remains *
Dressing, Casketing & Cosmetology *
Use of Facilities and Staff
Supervision of a Graveside/Committal Service *
Refrigeration *
Transportation (Within 50 miles of the Funeral Home)
Transfer of Remains Into Our Care (within 50 Miles, \$3/mi beyond) *
Hearse (within 50 Miles, \$3/mi beyond) *
Flower Van/Lead Vehicle *
Funeral Director and Staff Services
Basic Services of Funeral Director and Staff *

Total Services

Non-Guaranteed Cash Advance Items

We charge you for our services in obtaining those items designated with an asterisk(*) below. Certain charges may be estimated. Indicated by "est"

1 Burial right @ Bnai Darom Cemetery, Ocala FL

**Total Non-Guaranteed
Cash Advance Items**

Other Fees

Processing Fee

Total Official and Required Fees

Total Purchase Price

Merchandise

Caskets
#71006999 NAHUM UNFINISHED No Material
- Pine - Handles Lift off lid, Star of David *
Outer Burial Container
Jewish Graveliner *
Clothing
Jewish Shroud *
Monuments
3'-0" x 1'-2" x 0"- 4" Grey Granite Flush Memorial
Incls: Name, Dates of Birth & Death three
emblems, wording as allowed and installation
in Ocala *

Total Merchandise

PAYMENT SCHEDULE

Paid In Full
☐ Yes ☒ No

Total Purchase Price (Itemized on Page 1) \$
 Less Credit / Assignment N/A (0.00)
 Subtotal \$
 Less Down Payment Received on 12 / 17 / 2024 ()
 Remaining Balance Due \$
 Annual Percentage Rate (not to exceed 18%) 0.00 % Service Charge \$ 0.00
 (The amount you will have paid when you have made all scheduled payments.) Total of Payments \$

Purchaser's
Payment
Schedule

5
Number of Payments

Payments are Due Monthly Unless Indicated

☐ Quarterly ☐ Semi-Annually ☒ Annually

Final payment not to exceed regular installment amount.

Date 1st Payment is Due

Regular Payment Amount

Final Payment Amount

☒ Order Coupon
Payment Book

This agreement may be prepaid in full or in part at any time without penalty.

PRAUTHORIZED DEBIT

N/A

Initials

Purchaser to initial block if applicable. By initialing this block, Purchaser authorizes FSI to debit Purchaser's deposit account for all payments due under this Agreement. Each month FSI will initiate a debit in the amount of the monthly payment from Purchaser's account on or about the payment due date shown above. Either party may choose to terminate these preauthorized debits by sending 30 days prior written notice to the other party. If these preauthorized debits are terminated before all amounts due under this Agreement have been paid in full, Purchaser agrees to make payments by another payment method. Provide voided check or bank account information.

IRREVOCABLE CERTIFICATION

N/A

Initials

Purchaser to initial block if applicable. Unless Purchaser initials this block, this Agreement is revocable and may be cancelled at any time. By initialing this block, Purchaser certifies that Beneficiary is the Purchaser for the purpose of Section 497.459, Florida Statutes, and that as such is an applicant for, or a recipient of, public assistance and desires to make this Agreement irrevocable in order to qualify for such assistance.

RECEIPT OF PRICE LIST(S) ACKNOWLEDGEMENT

82

Initials

Purchaser to initial block to acknowledge receipt. By initialing this block, Purchaser acknowledges that before selecting the services and merchandise identified on Page 1, Purchaser received a copy of the General Price List and that the Casket Price List and Outer Burial Container Price List were made available to Purchaser.

IDENTIFICATION AND DESCRIPTION OF MANDATORY ITEMS AND EXPLANATION OF EMBALMING CHARGE

Nature of Charges. Charges are only for those items that you selected or that are required. If we are required by law or by a cemetery or crematory to use any items, we will explain the reasons in writing below. If you selected a funeral that may require embalming, such as a funeral with viewing, you may have to pay for embalming. You do not have to pay for embalming you did not approve if you selected arrangements such as a direct cremation or immediate burial. If we charged for embalming, we will explain why below.

- ☐ Embalming is authorized by the legally authorized person, due to the type of service selected.
- ☒ The cemetery of choice requires the use of an outer burial container (vault).
- ☐ The crematory requires the use of a cremation casket or container.
- ☐ The airline requires the use of a shipping or combination container.
- ☒ Refrigeration authorized by you, due to the type of services selected.
- ☒ Selection of exact plot @ time of need
 Temple Exe States inurnment right is included with
 purch of plot

TERMS AND CONDITIONS

- This Agreement is made and entered into by and between the parties and is effective as of the date of the last signature hereto.
- Purchaser is advised to refer to Chapter 497, Florida Statutes, for further information concerning this Agreement. A copy of Chapter 497, Florida Statutes, and the applicable trust instrument established thereunder may be inspected by Purchaser during business hours at Firm's place of business.
- Purchaser acknowledges that this Agreement was complete as to all essential terms prior to signing by Purchaser and that a copy thereof was, or will be, delivered to Purchaser.
- Firm has determined, as of the date of this Agreement, that the merchandise identified on Page 1 will be accepted at the following cemetery of Purchaser's choice: Temple Bnai Darom Cemetery, Ocala, FL
- Each payment received on this Agreement shall be allocated first to Service Charges, then to other fees, then to merchandise, then to services and lastly to cash advance items.
- The amounts to be trusted, pursuant to this Agreement, are the greater of 30% of the retail purchase price, or 110% of the wholesale cost, of funds collected for merchandise; 70% of funds collected for services; and, 100% of funds collected for cash advance items.
- Unless this Agreement has been made irrevocable, it may be cancelled. If this Agreement is cancelled within 30 days, Purchaser shall receive a refund of 100% of funds paid, less funds paid for delivered items. After 30 days, Purchaser shall receive a refund of 100% of funds paid for undeliverable merchandise, undelivered services and undelivered cash advance items. Other fees and Service Charges are non-refundable.
- The Board of Funeral, Cemetery and Consumer Services regulates preneed contracts in Florida. Should you have a complaint, you should contact the Board at the Division of Funeral, Cemetery and Consumer Services, 200 E. Gaines Street, Tallahassee, Florida 32399-0361, or by calling 1.800.323.2627.

If you purchased this Agreement anywhere other than Firm's place of business the following applies: You, the Purchaser, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the attached notice of cancellation form for an explanation of this right.

82
Signature of Purchaser

12 / 18 / 2024
MM DD YYYY

Stephen Solomon
Signature of Firm's Authorized Representative

12 / 18 / 2024
MM DD YYYY

4 1 2 0 0 1
FSI #

S U Z I
S of Name

S T E S
Counselor #1

Counselor #2

S O L O

B U R L

T G R V