

FUNERAL INSURANCE

This list is not a complete list of all statutes and regulations required to be addressed in form filings. It is intended solely to give companies guidance on common areas that are deficient. It is the company's responsibility to keep abreast of all changes to the Montana Insurance Code. Pursuant to § 33-1-501(4), CSI approval of any form may be withdrawn at any point for any reason enumerated in the statute.

The below checklists include hyperlinks to the electronic version of the Montana Code Annotated. MCA [33-1-501](#) and MCA [33-1-502](#) is our authority for forms approval

Authority for approval: Title 33-20-1501 *et seq.*, MCA, and 6.6.1002 *et seq.* ARM.

_____ Funeral Insurance Policy Forms	6.6.1010
_____ Funeral Insurance General Information	33-20-1501
_____ Beneficiary Designation & use of proceeds	33-20-1501 & 6.6.1012
_____ Right to Return Policy	6.6.1014
_____ Prohibitions	33-18-301(4) & 6.6.1020
_____ Unintentional Lapse	6.6.1016

_____ In addition to any disclosures required for life insurance, the funeral insurance issuer shall develop clear and conspicuous written disclosures as listed per [6.6.1018](#) and [33-20-1501](#).

_____ Solicitation materials and disclosure forms are subject to prior review and approval pursuant to Rule 6.6.1010(1), ARM, and Section [33-20-1501\(3\)](#), MCA.

Because funeral insurance is a type of life insurance, all non-conflicting life insurance policy requirements and disclosures must also be a part of funeral insurance forms.

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