



**Jimmy Patronis, Chief Financial Officer**  
**Florida Department of Financial Services**  
*Division of Funeral, Cemetery, and Consumer Services*  
 200 East Gaines Street  
 Tallahassee, Florida 32399-0361

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**NOTICE OF APPROACHING PRENEED SALES AGENTS RENEWAL DATE**

<<DATE>>

<<AE\_NAME>>  
 <<AE\_ADDRESS>>

Invoice Number: <<RENEWAL\_INVOICE\_NUMBER>>  
 Appointing Entity Number: <<AE\_NUMBER>>

**This is not an invoice – do not pay at this time.**

This letter is a Notice from the Department of Financial Services (Department), Division of Funeral, Cemetery, and Consumer Services (Division), to inform you that your company has one or more Preneed Sales Agents (PSAs) whose appointments will be due for renewal in <<RENEWAL\_MONTH>> of <<RENEWAL\_YEAR>>. This Notice provides which PSAs will be up for renewal as each appointment must be renewed if you will want them to continue representing you beyond the specified month.

PSA appointments can be renewed either electronically or through paper forms. If the renewal will be through paper forms, submit the completed “Renewal Summary Page” to the address provided in Form DFS-PSNR-1, Notice of Approaching Preneed Sales Agents Renewal (which is included in this Notice), and if renewing electronically, complete the renewal submission online using your Producer Appointment System (hereinafter referred to as “eAppoint”) account. The paper form, the eAppoint account portal, and additional instructions for each type of renewal can be accessed using the Division’s web page at:  
<http://www.myfloridacfo.com/division/funeralcemetery/>.

There is a general \$250 non-refundable renewal fee for each PSA appointment. However, please take note that there is an additional \$25 non-refundable fee for each PSA appointment renewal if choosing to renew using paper forms that require manual processing instead of renewing electronically through the eAppoint online licensing system. Information regarding application processing and appointment fees are provided under section 497.466(7), Florida Statutes, and Rule 69K-5.003(1), Florida Administrative Code.

PSAs cannot be renewed prior to <<DT\_BEF\_INV\_DT>>, because the online Renewal Invoice will not be available until the first day of <<RENEWAL\_MONTH>> <<RENEWAL\_YEAR>>. PSA appointment Renewal Invoices are populated via an aggregate monthly batch transaction, and are based on the Renewal Invoice that is accessible through your eAppoint account.

If you do not want to renew a particular PSA appointment or choose to terminate a particular PSA appointment, then prior to <<DT\_BEF\_INV\_DT>>, 5:00 PM ET, you must complete an appointment termination transaction through your online eAppoint account for any of the listed

PSAs. Otherwise, the Renewal Invoice will be locked and cannot be changed as of the first day of the month in which the renewals are due. The requirement for locking renewal invoices on the first day of the renewal month is necessary for purposes of reconciling amounts due versus amounts paid.

Therefore, any PSA listed on this Notice for whom you did not complete an appointment termination transaction prior to <<DT\_BEF\_INV\_DT>>, 5:00 PM ET, will be included on your final and locked <<RENEWAL\_MONTH>> <<RENEWAL\_YEAR>> Renewal Invoice. Once the Renewal Invoice is locked, and in the event you determine it contains one or more PSAs that you did not want to renew, your options are to either: (1) renew all PSAs on the final Renewal Invoice (the renewal fees are non-refundable) and then in the next month terminate the appointment(s) of those you did not want renewed; or (2) not renew any PSAs on the Renewal Invoice, which lets all the PSA appointments lapse, and then reappoint the applicable PSAs the next month (note that if you let an appointment lapse, the PSA cannot make any sales until their reappointment).

In order to avoid the above options, you can choose to *delete* a PSA so that it does not get included in the final Renewal Invoice by completing an online appointment termination transaction through your online eAppoint account by <<DT\_BEF\_INV\_DT>>, 5:00 PM ET, with the specific termination date (which is at least thirty (30) days prior to the effective date of the online termination transaction). The system will not include that PSA in the final Renewal Invoice, and you WILL NOT receive future reminders from the Department concerning renewal of the deleted PSAs.

The online Renewal Invoice must be paid in full no later than <<TERM\_DATE>>, 5:00 PM ET. in order to avoid cancellation of all PSA appointments listed on the Renewal Invoice.

### **SUMMARY INSTRUCTIONS**

- 1. Review the PSA appointments listed in this Notice.**
- 2. Prior to <<DT\_BEF\_INV\_DT>>, 5:00 PM ET, process an appointment termination transaction via your eAppoint account to remove any PSA appointment you will not want to renew.**
- 3. Regardless of the manner you choose to renew the PSA appointments (paper forms or electronically), you must access your eAppoint account during <<RENEWAL\_MONTH>> <<RENEWAL\_YEAR>> in order to pay your PSA Renewal Invoice in full and online.**

<<RENEWAL\_MONTH>> <<RENEWAL\_YEAR>> RENEWAL SUMMARY

NUMBER OF APPOINTMENTS

<<NUM\_APPTS>>

TOTAL AMOUNT DUE

<<INV\_AMT>>

APPOINTMENTS DUE FOR RENEWAL

<<APPT\_DETAILS>>

**Appointing Entity Number:** <<AE\_NUMBER>>

**Tycl:** 3706