

# Wisconsin Department of Safety and Professional Services

**Mail To:** P.O. Box 8935  
Madison, WI 53708-8935  
**FAX #:** (608) 251-3036  
**Phone #:** (608) 266-2112

**Office Location:** 4822 Madison Yards Way  
Madison, WI 53705  
**E-Mail:** [dsps@wisconsin.gov](mailto:dsps@wisconsin.gov)  
**Website:** <http://dsps.wi.gov>

## FUNERAL DIRECTORS EXAMINING BOARD

### INFORMATION FOR COMPLETING AGENT FOR BURIAL AGREEMENTS APPLICATION

#### **AN APPLICATION IS NOT COMPLETE UNTIL ALL OF THE FOLLOWING DOCUMENTS HAVE BEEN RECEIVED:**

1. **Application for Agent for Burial Agreements Registration (Form #2343)** – This application must be completed by a licensed Funeral Director or an operator of a Funeral Establishment in order for the applicant to be a registered Agent to sell or solicit the sale of burial agreements funded with the proceeds of a life insurance policy. If the Agent is already registered and wishes to sell or solicit on behalf of a different or additional Funeral Director or operator of a Funeral Establishment, complete **Form #2345**.
2. **\$75.00 Initial Credentialing Fee** – Must accompany the completed application. Please make check or money order payable to Department of Safety and Professional Services.
3. **Completion of Training (if applicable)** – Attach evidence of successful completion of at least 20 hours of approved educational training. An agent who is a WI licensed Funeral Director and a WI licensed insurance intermediary is exempt from completing the 20 hours of approved educational training as provided in Wis. Admin. Code § FD 6.05.
4. **Contract(s)** – Attach a copy of each contract between the Agent(s) listed in Section A and the operator of a Funeral Establishment listed in Section B of page 2.

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### APPLICATION FOR AGENT FOR BURIAL AGREEMENTS REGISTRATION

<b>PLEASE TYPE OR PRINT IN INK</b> <input type="checkbox"/> Your name, address, telephone and electronic address are available to the public. Check box to withhold this information from lists of 10 or more credential holders (Wis. Stat. § 440.14).			
<b>Section A:</b> This section identifies the agent who will be under contract with the Funeral Director or operator of a Funeral Establishment listed under Section B.			
<b>Last Name</b> <input style="width: 90%;" type="text"/>	<b>First Name</b> <input style="width: 90%;" type="text"/>	<b>MI</b> <input style="width: 90%;" type="text"/>	<b>Former / Maiden Name(s)</b> <input style="width: 90%;" type="text"/>
<b>Address</b> (street, city, state, zip) <input style="width: 95%;" type="text"/>		<b>Daytime Telephone Number</b> <input style="width: 25%;" type="text"/> - <input style="width: 25%;" type="text"/> - <input style="width: 25%;" type="text"/>	
<b>Mailing Address</b> (if different) <input style="width: 95%;" type="text"/>		<b>Date of Birth</b> <input style="width: 15%;" type="text"/> / <input style="width: 15%;" type="text"/> / <input style="width: 25%;" type="text"/>	
<b>Social Security #</b> <input style="width: 25%;" type="text"/> - <input style="width: 25%;" type="text"/> - <input style="width: 25%;" type="text"/>		Your Social Security Number or Employer Identification Number must be submitted with your application on this form. If you do not have a Social Security Number, you must complete Form #1051. The Department may not disclose the Social Security Number collected except as authorized by law.	
Ethnicity/gender status information is optional.			
<b>Ethnicity:</b> <input type="checkbox"/> White, not of Hispanic origin <input type="checkbox"/> American Indian or Alaskan <input type="checkbox"/> Hispanic <input type="checkbox"/> Black, not of Hispanic origin <input type="checkbox"/> Asian or Pacific Islander <input type="checkbox"/> Other			
<b>Sex:</b> <input type="checkbox"/> M <input type="checkbox"/> F			
<b>Have you ever been licensed in Wisconsin as an Agent for Burial Agreements?</b>		<input type="checkbox"/> Yes <input type="checkbox"/> No      If yes, list your credential number:	
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>	
<b>Is Agent also a licensed Funeral Director?</b>		<input type="checkbox"/> Yes <input type="checkbox"/> No      If yes, list your credential number:	
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>	
<b>Email Address</b> <input style="width: 95%;" type="text"/>			
<b>Agent's Wisconsin Life Insurance Intermediary License #:</b> <input style="width: 90%;" type="text"/>		<b>Expiration Date</b> <input style="width: 15%;" type="text"/> / <input style="width: 15%;" type="text"/> / <input style="width: 25%;" type="text"/>	
<b>List the insurer or insurers whom you represent</b> (attach additional sheet(s) if necessary) <input style="width: 95%;" type="text"/>			

**APPLICATION FEES:** Please check applicable box. Make check payable to DSPS and attach to this application.

**Initial Credentialing Fee**  
 \$ 75.00 Total Fee Attached

**For Receiving Use Only (107)**

# Wisconsin Department of Safety and Professional Services

**ANSWER THE FOLLOWING QUESTIONS** (attach additional sheet(s) if necessary)

1.	Have you ever surrendered, resigned, canceled, or been denied a professional license or other credential in Wisconsin, or any other jurisdiction? <b>If yes, give details on an attached sheet, including the name of the profession and the agency.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	Has any licensing or other credentialing agency ever taken any disciplinary action against you, including but not limited to any warning, reprimand, suspension, probation, limitation, or revocation? <b>If yes, attach a sheet providing details about the action, including the name of the credentialing agency and date of action.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	Is disciplinary action pending against you in any jurisdiction? <b>If yes, attach a sheet providing details about pending action, including the name of the agency and status of action.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	Have you ever been convicted of a misdemeanor, felony, or other violation of federal, state, or local law or do you have any felony, misdemeanor or other violation of federal, state, or local law charges pending against you in this state or any other? This includes municipal ordinances resulting only in monetary fines or forfeitures and convictions resulting from a plea of no contest, a guilty plea or verdict. <b>If yes, submit Convictions and Pending Charges (Form #2252).</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.	Are you incarcerated, on probation, or on parole for any conviction? <b>If applicable, attach a sheet providing details including the terms of incarceration and a copy of a report from your probation or parole officer.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
6.	Are you registered or licensed in any other profession(s)? <b>If yes, state what profession(s) and in what state(s):</b> <input style="width: 100%;" type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
7.	Have you ever been credentialed under any other name(s)? <b>If yes, state name(s) credentialed under:</b> <input style="width: 100%;" type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No

<b>Section B:</b> This section identifies the operator of one of more Funeral Establishments who has contracted with the Agent in Section A. <b>A contract for each establishment must be included with this application. This document is not a contract.</b> The contract must be in accordance with Wis. Admin. Code § FD 6.08.	
<b>Funeral Establishment's Name</b> <input style="width: 95%;" type="text"/>	<b>Funeral Establishment's License #</b> <input style="width: 95%;" type="text"/>
<b>Business Address of Operator of the Funeral Establishment</b> (street, city, state, zip) <input style="width: 95%;" type="text"/>	<b>Office Telephone Number</b> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> - <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>

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# Wisconsin Department of Safety and Professional Services

## CERTIFICATION OF LEGAL STATUS:

I declare under penalty of law that I am (check one):

- A citizen or national of the United States, or
- A qualified alien or nonimmigrant lawfully present in the United States who is eligible to receive this professional license or credential as defined in the Personal Responsibility and Work Opportunities Reconciliation Act of 1996, as codified in 8 U.S.C. §1601 et. Seq. (PRWORA). For questions concerning PRWORA status, please contact the U.S. Citizenship and Immigration Services in the Department of Homeland Security at 1-800-375-5283 or online at <http://www.uscis.gov>.

Should my legal status change during the application process or after a credential is granted, I understand that I must report this change to the Wisconsin Department of Safety and Professional Services immediately.

## CONTINUING DUTY OF DISCLOSURE

I understand that I have a continuing duty of disclosure during the application process. If information I have provided in this application becomes invalid, incorrect or outdated, I understand that I am obliged to provide any necessary information to ensure the information on my application remains current, valid, and truthful. I understand that Credentialing authorities may view acts of omission as dishonesty and that my duty of disclosure during the application process exists until licensure is granted or denied.

## AFFIDAVIT OF APPLICANT

I declare that I am the person referred to on this application and that all answers set forth are each and all strictly true in every respect. I understand that failure to provide requested information, making any materially false statement and/or giving any materially false information in connection with my application for a credential or for renewal or reinstatement of a credential may result in credential application processing delays; denial, revocation, suspension or limitation of my credential; or any combination thereof; or such other penalties as may be provided by law. I further understand that if I am issued a credential, or renewal, or reinstatement thereof, failure to comply with the statutes and/or administrative code provisions of the licensing authority will be cause of disciplinary action.

By signing below, I am signifying that I have read the above statements (Certification of Legal Status, Continuing Duty of Disclosure, and Affidavit of Applicant) and understand the obligation I have as an applicant or credential-holder should information I've provided to the Department of Safety and Professional Services change.

Signature:

(Print and Sign Form)

Date:

 /  /