

Wisconsin Department of Safety and Professional Services

Office Location: 4822 Madison Yards Way
Madison, WI 53705
Phone Number: (608) 266-2112

LicensE Portal: License.wi.gov
Email: dsps@wisconsin.gov
Website: <http://dsps.wi.gov>

CEMETERY BOARD

AFFIDAVIT RELATING TO ALTERNATIVE CARE FUND INVESTMENTS

For a full description of the classes of alternative investments see Wis. Admin. Code §§ [CB 5.04](#) (1) (a) to (e).

Class of Alternative Investment: (Check all that apply.)	Market Balance of Each Class of Investment as of:
<input type="checkbox"/> Corporate Bonds or Government Instruments: Wis. Admin. Code § CB 5.04(1)(a)	\$ <input type="text"/>
<input type="checkbox"/> Utilities Stocks: Wis. Admin. Code § CB 5.04(1)(b)	\$ <input type="text"/>
<input type="checkbox"/> Certificates of Deposit: Wis. Admin. Code § CB 5.04(1)(c)	\$ <input type="text"/>
<input type="checkbox"/> Mutual Funds: Wis. Admin. Code § CB 5.04(1)(d)	\$ <input type="text"/>
<input type="checkbox"/> Other Investments: Wis. Admin. Code § CB 5.04(1)(e)	\$ <input type="text"/>

If you check "Other Investments," a Licensed Investment Advisor or a Licensed Securities Broker must sign the affidavit.

I certify that I am an officer, a trustee who has been elected pursuant to Wis. Stat. § [157.062](#) or Certified Public Accountant acting on behalf of the Cemetery Authority listed below, and I hereby certify that the Cemetery Authority has care funds, which it received for the sale of cemetery lots and has placed them in one or more of the classes of alternative investments listed above.

I also certify that each of the above-described investments are in compliance with the criteria relating to it, as stated in Wis. Admin. Code § [CB 5.04](#) (1)(a), (b), (c), (d) or (e).

Name of Cemetery Authority

Signature (If unable to provide a digital signature print and sign form.)

Date

Print or Type Name of Person Signing Above

Title