

Streamlined Administration



AUTOMATED INCOME ALLOCATION

We provide administration of cemetery contracts with our proprietary recordkeeping system—automating the allocation of your income on at least a monthly basis.



STREAMLINED PAYMENT PROCESSING

Submit funds to ClearPoint Trust via ACH, drafting the consumer's account, or utilize personalized coupon books. ClearPoint Trust will apply payments to the contracts by agreed upon funding hierarchy.



AUTOMATED TRUSTING CALCULATION

The ClearPoint Trust recordkeeping system automatically calculates the amount of funds to keep in the trust based on state requirements.

Modernized Recordkeeping



COMPREHENSIVE REPORTS

Download reports to PDF or Excel for review, reconciliation, analysis, and completion of state annual reports.



SECURE DIGITAL GATEWAY

24/7 secure online access to contract level details, payment history, reports, submitting disbursement requests, uploading documents and more.



ENHANCING THE FINANCIAL MANAGEMENT OF YOUR CEMETERY PRENEED PROGRAM

CHOOSE THE PACKAGE THAT BEST FITS YOUR NEEDS

ESSENTIAL PACKAGE

- ✓ Automated Income Allocation
- ✓ Streamlined Payment Processing
- ✓ Automatic Trusting Calculation
- ✓ Downloadable Comprehensive Reports
- ✓ Client Portal Access
- ✓ Standard ClearPoint Trust Forms
- ✓ ACH Draft of Contributions
- ✓ QFT Tax Processing
- ✓ Legal / Compliance Support

PARTNER PACKAGE

- ✓ Automated Income Allocation
- ✓ Streamlined Payment Processing
- ✓ Automatic Trusting Calculation
- ✓ Downloadable Comprehensive Reports
- ✓ Client Portal Access
- ✓ White Label Trust Forms
- ✓ Legal / Compliance Support
- ✓ Custom Data Feeds Available
- ✓ Flexible Contribution Processing
- ✓ Grantor Letters Available

**AT-NEED TRUSTING CALCULATION OPTION
IS AVAILABLE FOR AN ADDITIONAL FEE.**

Learn more at ClearPointTrust.com



About Us

ClearPoint Trust facilitates simplicity and satisfaction in our partnerships through value, expertise, innovation, and professionalism.

Our dedication to the industry, along with our financial strength, drives a clear vision of growth and commitment to you and your business.

ClearPoint Trust is dedicated solely to the funeral and cemetery industry and has been serving customers since 1998.

Why Choose Us?

VALUE

We are a trusted partner that clearly cares about your success, both now and in the future. We provide exceptional business advice tailored to your distinct needs.

PROGRESSIVE

We have a pulse on state and federal legislation and regulations and pride ourselves on being proactive and innovative.

EXPERTISE

We are an industry leader in providing funeral and cemetery-related fiduciary services, investment management, recordkeeping, and reporting, with regulatory and compliance expertise.

PROFESSIONAL

We offer a diverse team of professionals passionate about serving you and your client families.

ClearPoint Trust
Division of Community Bank, N.A.

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