

## DEPARTMENT OF HEALTH SERVICES

714/744 P STREET  
P.O. BOX 942732  
SACRAMENTO, CA 94234-7320



August 3, 1992

TO: All County Welfare Directors  
All County Administrative Officers  
All County Medi-Cal Specialists/Liaisons

Letter No.: 92-50

SUBJECT: DESIGNATED BURIAL FUNDS, TITLE 22, CALIFORNIA CODE OF REGULATIONS,  
SECTION 50479

The purpose of this memo is to inform counties of a policy change regarding burial funds. Counties must implement this policy change no later than October 1, 1992.

Under this revised policy, an individual may no longer designate any form of property or cash-on-hand as burial funds. Designated burial funds must now be separately identifiable funds that are clearly designated for burial expenses. This includes:

- o revocable burial contracts;
- o revocable burial trusts; or
- o other revocable burial arrangements.

Also, designated burial funds no longer may be commingled with nonburial property and must be separated in order to continue to be exempt. This change in policy does not affect the \$1500.00 limit on designated burial funds, nor the exemption of the interest which accrues on those funds which are not removed from the fund.

Resources that were previously excluded as burial funds but do not meet the new criteria, must be converted to an acceptable form of burial funds in order to continue to be excluded from resources. If an individual has designated burial funds which would result in excess property, counties must inform that individual at application or redetermination that such funds must be converted/separated. The individual shall be allowed until the end of the month following the month of the notification to complete the conversion/separation.

If you have any questions on this issue, please call Sharyl Shanen-Raya at (916) 657-2942.

Sincerely,  
ORIGINAL SIGNED BY

Frank S. Martucci, Chief  
Medi-Cal Eligibility Branch