# FUNERAL CONSUMERS ALLIANCE OF CALIFORNIA 2019 ANNUAL STATE CONFERENCE

# Saturday, November 9, 2019 Santa Cruz Memorial Park 1927 Ocean Street, Santa Cruz, California 95060

# **Hosted by the Funeral Consumers Alliance of Monterey Bay**

**ATTENDANCE:** TOTAL 22+ (22 members from 8 affiliates and ? guests, see Attachments)

#### **FCA-CALIFORNIA BOARD MEMBERS**

Present: Jean Okuye, Sylvia Forsyth, Nancy Ortiz, Kathy Ortiz, Bev Blum,

Hannah Dunton

Absent: Cheryll Moore (excused)

**MEETING BROUGHT TO ORDER** at 9:30am, chaired by Sylvia Forsyth, President, FCA-Monterey Bay. Sylvia began by thanking Randy Krassow, of Santa Cruz Memorial Park, who generously donated today's meeting spaces and who will give a tour of their crematorium later today. She followed with some announcements, gave an overview of today's agenda and then introduced Jean Okuye, President, FCA-California.

#### I. BUSINESS MEETING

The business meeting was chaired by Jean Okuye, President, FCA-California.

#### 1. OPENING

- A. HOSTING Jean thanked FCA-Monterey Bay for hosting the 2019 Annual State Conference and for all their hard work.
- B. INTRODUCTION OF THE FCA-CA BOARD OF TRUSTEES (2018-2019)

Position:	Name:	Term Ex	pires:
President	Jean Okuye	2019	2nd
Vice President	Cheryll Moore	2021	2nd
Secretary	Nancy Ortiz	2019	3rd
Treasurer	Kathy Ortiz	2020	1st
Trustees-at-Large	Sylvia Forsyth	2021	3rd
_	Hannah Dunton	2021	1st
	Bev Blum (interim)	2022	

All trustees were present except for Cheryll Moore (excused).

2. MINUTES OF 2018 ANNUAL STATE CONFERENCE (Nancy Ortiz, Secretary) A motion to approve the 2018 Annual State Conference Minutes, as submitted, was made (Marjorie Bridges), seconded (Mary Bullard) and passed by the attending affiliates.

# **3. FINANCIAL REPORT (**Kathy Ortiz, Treasurer)

Fiscal Year runs January 1, 2019 to December 31, 2019 Copies of the reports were distributed. The following reports are summarized. For the full financial reports, see the Attachments.

#### 2019 ANNUAL BUDGET REPORT

Income: \$1,733.03 Expenses: \$1,921.02 Deficit: (-\$187.99) Current Bank Balance: \$8,733.53

#### 2020 PROPOSED ANNUAL BUDGET

Income: \$ 825.00 Expenses: \$2,252.00 Current Bank Balance: \$9,355.85

A motion to approve the 2019 Annual Budget Report and the 2020 Proposed Annual Budget was made (Sylvia Forsyth), seconded (Bev Blum) and passed by the attending affiliates.

We may want to consider fundraising in the future.

# 4. ELECTION OF THE BOARD OF TRUSTEES (2019-2020)

A. NOMINATIONS AND ELECTIONS - Jean Okuye and Nancy Ortiz have termed-out and will be leaving the Board. Terms are for three years. There are three Board positions to fill. There were no nominations from the floor. Jean introduced three people who have a passion for this work and who are willing to serve on the Board. They are: Bev Blum (has been serving as an interim Board Member) is a San Joaquin and the Mother Lode Board Member; Randy Siefkin is Stanislaus/Merced President; and John Jones is Northern Calif. President.

All three were nominated for the Board (Sylvia Forsyth) and seconded (Jane Hillhouse). With a vote by acclamation, Bev Blum, Randy Siefkin and John Jones were unanimously approved to serve as Board of Trustees Members-at-Large. Welcome to the Board Bev, Randy and John.

#### B. FCA-CA BOARD OF TRUSTEES (2019-2020)

Position:	Name:	Term Expir	es:
President	Cheryll Moore	2021 2	2nd
Vice President	Sylvia Forsyth	2021	3rd
Secretary	Hannah Dunton	2021	1st
Treasurer	Kathy Ortiz	2020	1st
Trustees-at-Large	Bev Blum	2022	1st
-	Randy Siefkin	2022	1st
	John Jones	2022	1st

5. WEBSITE (Kathy Ortiz, Administrator) Kathy Ortiz will address this during her presentation.

- **6. WEST COAST DIRECTORY** (Kathy Ortiz, Editor) The Directory is posted on the FCA-CA website (<a href="www.fca-calif.org">www.fca-calif.org</a>). Email any changes to Kathy (katzztheva@gmail.com).
- 7. LEGISLATIVE, HOTLINE CALLS AND CEMETERY AND FUNERAL BUREAU REPORTS (Marjorie Bridges) Copies of Marjorie Bridges' reports were available (see Attachments).

#### A. LEGISLATIVE REPORT HIGHLIGHTS:

- Endowment Care Funds of Private Cemeteries Previously, cemeteries could only
  use the interest earned, not the principal. Cemeteries can now apply to the CFB for
  permission to convert their endowment care funds to a Unitrust distribution.
- 2) Vital Records Birth and Death records will be kept on file at the State Registrar's office. The public may not be able to get copies locally because the counties are no longer required to keep the records.
- B. HOTLINE CALLS Some of the calls are in regards to the cost of funerals, how to afford a funeral, FCA Transfer Forms, and consumer complaints should go to the CFB. Marjorie has a good understanding of mortuaries and how to answer people's questions about them. She doesn't know as much about cemeteries and she thinks that FCA should have a contact person for cemeteries who is more knowledgeable than her.

#### C. CEMETERY AND FUNERAL BUREAU

- 1) Jean Okuye currently serves on the CFB Advisory Committee. Terms are for two years. Over the years we have had a number of FCA members on the committee.
- 2) In CFB's "Consumer's Guide to Funeral and Cemetery Purchases," FCA is listed as a consumer resource along with our Hotline phone number (Marjorie Bridges' phone number).
- Consumer Complaints Marjorie Bridges thinks that it should be far easier to learn about what the outcomes are regarding complaints. Resolutions are online but are difficult to locate on CFB's website.
- 4) Cemeteries and Mortuaries who have been fined for non-compliance should be listed as such on CFB's website so that consumers have easy access to the information.
- 5) Jean Okuye proposed that FCA form their own Advisory Committee to follow CFB's regulations and to support CFB's enforcement of those regulations. A motion was made (Sylvia Forsyth), seconded (Kathy Ortiz) and passed to form said FCA Advisory Committee.
- 2020 ANNUAL STATE CONFERENCE LOCATION Kathy Ortiz volunteered FCA-Humboldt as the location for the 2020 State Conference, pending approval by their Board.

#### **BUSINESS MEETING CONCLUDED**

#### II. RECOGNITION

CERTIFICATES OF APPRECIATION created by Cheryll Moore, and presented by Sylvia: Jean Okuye, outgoing President, received a Certificate of Appreciation for her five years of Board Service along with a beautiful orchid; Nancy Ortiz, outgoing Secretary, received a Certificate of Appreciation for her seven years of Board Service. Both Jean and Nancy were pleased with their certificates and with the Board's thoughtfulness.

#### **III. PRESENTATIONS**

# CALIFORNIA'S FUNERAL CONSUMERS ALLIANCES TODAY AND HOW TO SERVE MORE CALIFORNIANS

- 1. UPDATING YOUR TECH CONTACTS (Kathy Ortiz, FCA-CA Treasurer, President FCAH)
  - A. THE GOAL OF EACH FCA should be to educate and connect with the public on the local, State and National levels. Some tools to achieve this communications goal are having a website, email, a social media presence (e.g. Facebook, Twitter) and a cell phone. For the 65+ demographic, internet usage has gone up from 14% (2000) to 73% (2019).
  - B. WEBSITE It's not hard to set up. You don't need to hire anyone; you can do it yourself. Kathy's recommendation is to use WIX.com. It's simple (click and drag) and mainstream and is easy to transfer information over from an existing website. Templates are available and easy to edit. The basic plan is \$168.00 a year. There are extra costs for additional features such as WIX advertising and a SEO feature [Search Engine Optimization that captures key words (death, funeral, caskets, etc.) for a target audience].
    Use your website to stay connected by posting conferences, local events, legislation, county and city laws, newsletters, announcements, membership applications, fundraising campaigns, how to donate (can use PayPal) and resource links.
  - C. EMAIL ACCOUNT Kathy recommends a Google account. Open an account by creating a name, password and then a Gmail account. Link Gmail to your website and cell phone. Have a dedicated person(s) to monitor and reply to emails. If an email has been opened, the text is unbolded and you can check if someone has replied by looking in the "sent folder" or you can also bcc. to the appropriate person's personal email account. Answer all emails in a timely manner.
  - D. SOCIAL MEDIA Facebook appeals more to 40+ year-olds. Twitter is very visual. You can connect directly to experts in their field (hospice, oncologist, government agency, etc.).
  - E. CELL PHONES are very convenient for calls, texts, emails and internet access. FCA-CA uses Tracfone as its service provider. They have very reasonable rates, with no contract, and they have automatic bill pay.
- 2. REVIVING AFFILIATES (Jean Okuye, Bev Blum) This year, two struggling affiliates, Northern California and Tri-County, have been revived or are in the process of being revived. In both cases, the volunteer Board Members were aging, with no volunteer replacements stepping up. It is imperative to have new Board Members rotating in to keep your affiliate infused with new blood and vitality.

NORTHEN CALIFORNIA - A letter of interest was mailed to the membership asking what they wanted to do with their affiliate. Their response was to revive their affiliate. Jean Okuye called for a membership meeting and six of the attendees formed a Board, which included John Jones, President, and Hannah Dunton, Secretary. They spent their first months (May, June, July) organizing, prioritizing and accomplishing tasks one by one.

They have since published a newsletter, created a website and got their old phone number back.

TRI-COUNTY - Their 2,600 members voted to continue their affiliate. A membership meeting was called. Jean Okuye and John Jones traveled south to attend their meeting and to lend their expertise.

- **3. EXPLORING WAYS TO STRENGTHEN CALIFORNIA AFFILIATES** (Bev Blum, Sylvia Forsyth)
  - A. MERGING COMMITTEE Bev has been working with the Merging Committee to assist struggling affiliates to reorganize themselves or for them to merge with a sister affiliate. To help lessen the load on the individual affiliates, what key affiliate services (member and public), support services and tasks could be consolidated at the State level, rather than be duplicated by each affiliate?

    A challenge is to increase FCA's visibility on the State and local level. In terms of representing the total population by FCA service area, Humboldt has 1-2% who are members and the other FCA's are in the .001-.002% range for memberships.
  - B. GROUP BRAINSTORMING IDEAS The hope is to form discussion groups that will meet by phone over the next three months.
    - 1) Services to the Community:
      - Price List of Cemeteries and Mortuaries Collect information from local service providers; website General Price Lists do not always include individual charges (e.g. cremation container prices).
      - Speakers Bureau
      - Printed Materials brochures (National and local)
      - Phone Line
      - Email
      - Local tech support
      - Website
      - Social Media
    - 2) State Level Support
      - Website with links
      - Statewide Newsletter with a page from each affiliate for their own information
      - Phone Line that's answered in a timely manner
      - Public Education
      - Attend events
      - E-Blasts
      - Speakers Bureau for local presentations
      - Electronic Media to reach younger demographic
      - CFB Advisory Board form our own committee to follow their activity
      - Advocacy on the legislative level is very important
      - Speaker Resources: literature, brochures, PowerPoint presentations
      - YouTube
      - Webinars (they're easy to do)

#### 3) Outreach

- a) YouTube Channel why, what, how; links to relevant videos such as People's Memorial Association in Washington State
- b) Speakers
  - Presentations with or without PowerPoint
  - Prepared Talk 20 minutes
  - Q&A
  - Prevent high costs
  - Webinars
  - Radio/TV interviews
  - Farmer's Markets
- c) Resources
  - National President Ruth Bennett
  - "Day of the Dead" aka "El Día de los Muertos"
  - Movies: "Obit" and "Trouble with Harry"
  - National Death Care
- d) Funeral Homes and Cemeteries promote the "good guys"

#### 4) Newsletter and Fundraising

- a) Issues
  - Keeping database updated/return addresses
  - Coming up with content
  - Expensive to print and pay for mailing/returns
- b) What can help?
  - National News
  - State Report
  - Member can request an electronic copy (How would you like to receive your Newsletter?)
  - Printed donation envelope
  - State to convert to a 501(c)(3)
  - Attachments and links back to site
  - Enrollment Form (Membership Application)

# 5) Tech Support

- a) Phone
  - Google Voice is free
  - Send to a person's phone specific days, specific people
- b) Website
  - · Email Gmail or another email account
  - #1 Priority timely answering
  - Set up pages for the affiliates that don't have money or a website
- c) Webinars
  - Education YouTube
  - Follow "Ask a Mortician"
  - Broadcasting Conferences part of promoting FCA

**LUNCH: Vanessa Steinberg**, of Santa Cruz Hospice, was available during lunch to hand out information and to answer questions.

# **IV. KEYNOTE SPEAKERS**

# IT'S ALL ABOUT THE ENVIRONMENT: "OUR CARBON FOOTPRINT AND ALL THE OPTIONS: CREAMATION, AQUAFICATION, GREEN BURIAL AND RECOMPOSITION"

SPEAKERS: Brad Angell (architectatlaw@gmail.com)

UCSC professor, member of the Green Burial Council

**Holly Blue Hawkins** (hollyblue@lastrespectsconsulting.com) Founder, Last Respects Consulting

THE BIG FIVE OF DISPOSITION are 1) Conventional Burial, 2) Cremation, 3) Alkaline Hydrolysis (aka aquafication or water cremation), 5) Recomposition.

THE GREEN BURIAL COUNCIL has three classifications of green cemeteries 1) hybrid cemetery, 2) natural cemeteries and 3) conservation burial grounds (established by a land trust).

RECOMPOSITION - RECOMPOSE (trade-marked) will have their first site opened in 2021. Recompostion is a thirty-day process and produces one cubic yard of compost. This end-stage material no longer has any detectable human DNA. Recomposition saves over one metric ton of carbon per person. The cost is comparable to that of a cremation.

DEATH AND THE TRIPLE BOTTOMLINE - In the past the Triple Bottomline has been Social, Financial and Environmental. In today's climate it's not only about the money anymore. We should shift our focus to the new Triple Bottomline of Ecological, Economical and Equitable.

COMPOSTING BASICS - There are five main areas that must be "controlled" during composting. How does composting work? (from the EPA)

- 1) feedstock and nutrient balance
- 2) particle size (silver dollar-sized)
- 3) moisture content (balanced)
- 4) oxygen flow
- 5) temperature (140 degrees F)

There are two methods of composting: aerobic (with oxygen) and anaerobic (absence of oxygen). Examples of aerobic composting are windrows and vermiculture (using worms). Anaerobic composting takes place in a closed vessel (in-vessel composting)

HOW TO JUDGE SUSTAINABILITY - There are environmental tests and economic tests. Cataloging, reviewing and mapping are ways to judge environmental impacts as well as greenhouse gas inventories. Cradle to grave to cradle is the next step in sustainability. Sustainability is operational superiority.

BOOKS: <u>Cradle to Cradle</u> by Michael Braungart The Upscale by William McDonough WE'RE AT A TURNING POINT to "upscale" cradle to grave to cradle rather than following the more traditional norms.

ONE'S LEGACY AND END-OF-LIFE CHOICES are not just personal anymore. There is a bigger picture to consider. There are 2.8 million deaths annually in the United States. Cremation uses large amounts of fossil fuels. Over the next 20 years, 75+ million baby boomers will die. The environmental implications of our decisions are profound. Consider your choices when meeting the needs of the present, without impacting future generations to meet their own needs. Remember:

THE NATURAL DEATHCARE triple bottomline: Ecological, Economical and Equitable.

#### **QUESTIONS AND ANSWERS:**

- 1. Biodynamic Composting Cycle Pathogens are killed during the composting process due to the heat (140 degrees F) that's generated.
- 2. Mid-Peninsula Land Trust (Santa Cruz County) FCA should do a presentation for them because they absolutely refuse to allow Recomposition.
- 3. Burial at Sea is available out of Fort Bragg and Santa Barbara.
- 4. Sky Burial is not allowed in the United States.
- 5. Reef Balls are pods that contain cremains and are used to create new marine habitats.
- 6. Mushroom Suits Fungi assist in decomposition. Spores are sewn onto a cotton body suit.
- 7. Tree Pod Burial Post rigor mortis, the body is shaped into a prenatal position and placed into an egg-shaped pod and buried with a tree seedling on the top that will grow. They are also available in smaller sizes for cremains.
- 8. Recompose was originally know as the Urban Deathcare Act.
- 9. Death traditions vary around the world by culture, religion and geography.
- 10. Embalming In the United States, embalming gained in popularity during the Civil War as a way to preserve bodies for the long transport home. Abraham Lincoln's body was preserved by embalming for his funeral procession and for the public viewings that were held in different cities along the train route to his home in Illinois. The trip took two weeks.

# **KEYNOTE PRESENTATIONS CONCLUDED**

CREAMORTIUM TOUR was available for those who were interested.

# **CONFERENCE CLOSED**

Minutes respectfully submitted by Nancy Ortiz, outgoing Secretary.

# FUNERAL COINSUMERS ALLIANCE OF CALIFORNIA 2019 ANNUAL STATE CONFERENCE SATURDAY, NOVEMBER 9, 2019

#### **ATTACHMENTS**

#### LIST OF ATTACHMENTS

Attendance List of Affiliates 2019 Annual Affiliate Reports (5) 2019 Annual Budget Report 2020 Proposed Annual Budget 2019 Hotline Calls What's on the CFB Website 2019 California Legislative Report

#### ATTENDANCE LIST OF AFFILIATES: 8 Affiliates, 22 Members

Bay Area Funeral Consumers Association

Wendy Lynn Donald Wallace Jane Hillhouse Marjorie Bridges

FCA of Monterey Bay

Sylvia Forsyth Truette Bobo Holly Blue Hawkins Marianne Franks

FCA of Humboldt

Kathy Ortiz Nancy Ortiz Kenna Reed

FCA of Central California

John Donaldson

FCA of Northern California

Hannah Dunton John Jones Alswell Julian Jones

FCA of San Joaquin Co. & the Mother Lode

Bev Blum Mary Bullard Harry Welte

FCA of Stanislaus/Merced

Jean Okuye Randy Siefkin

Central Coast Memorial Society

Samantha Douglass

# 2019 ANNUAL AFFILIATE REPORTS TO FCA-CA REPORTING PERIOD 10-1-18 TO 9-30-19

# AFFILIATES REPORTING AND NUMBER OF BOARD MEMBERS

- 1. FCA of Stanislaus/Merced 5
- 2. FCA of Humboldt 7
- 3. FCA of San Joaquin Co. and the Mother Lode 7
- 4. FCA of Monterey Bay 5
- 5. FCA of Northern California ? No report, they're reorganizing.

MEMBERS:	Total	New	Service Area Population
1. Stanislaus/Merced	901	23	770,000
<ol><li>Humboldt</li></ol>	924	10	136,000
<ol><li>San Joaquin</li></ol>	1,000	22	861,700
<ol><li>Monterey Bay</li></ol>	807	9	710,000

PUBLIC EDUCATION:	People at Speaking Engagements	Phone Calls per Month
<ol> <li>Stanislaus/Merced</li> </ol>		
<ol><li>Humboldt</li></ol>	14	5
<ol><li>San Joaquin</li></ol>	45	10-15
4. Monterey Bay	3	4

MEMBER DISCOUNTS:	Contracts with Mortuaries	
<ol> <li>Stanislaus/Merced</li> </ol>	1	
<ol><li>Humboldt</li></ol>	0	
<ol><li>San Joaquin</li></ol>	1	
4. Monterey Bay	2	

FINAN	ICES:	Income	Expenses	Donors	Source of Income
1.	Stanislaus/Merced	\$1465	\$1469	20	dues, donations, book sales
2.	Humboldt	\$2706	\$3195	45	memberships, donations, sales, yard sale
3.	San Joaquin	\$3845	\$3900	72	donations from members
4.	Monterey Bay	\$ 569	\$ 602	3	donations, closing fees

# DATABASE:

1.	Stanislaus/Merced	Jack Heinsius	jackheinsius@aol.com	209-402-2792
2.	Humboldt	Kathy Ortiz	katzztheva@gmail.com	707-834-3442
3.	San Joaquin	Mary Bullard	marybee2@gmail.com	209-477-8745
4.	Monterey Bay	Truette Bobo	beaubeaux@cheerful.com	831-475-8473

# PHONE:

1.	Stanislaus/Merced	Jean Okuye	jeanokuye@gmail.com	209-756-2421
2.	Humboldt	Nancy Ortiz	brownbuffalo@suddenlink.net	707-822-5378
3.	San Joaquin	Mary Bullard	marybee2@gmail.com	209-477-8745
4.	Monterey Bay	Sylvia Forsyth	forsyl27@gmail.com	831-334-0766

# **NEWSLETTER:**

1.	Stanislaus/Merced	Randy Siefkin	rsiefkin@aol.com	209-480-8575
2.	Humboldt	Kathy Ortiz	katzztheva@gmail.com	707-834-3442
3.	San Joaquin	Bev Blum	blumbev@gmail.com	209-477-5970
4.	Monterey Bay	Sylvia Forsyth	forsyl27@gmail.com	831-334-0766

# FUNERAL CONSUMERS ALLIANCE OF CALIFORNIA 2019 INCOME AND EXPENSE REPORT

# **Prepared by Katherine Ortiz, Treasurer**

ITEM	INCOME		EXPENSES
State Conference Registration	\$661.04		
Donation	25.00		
Homestead Website Refund	21.99		
Annual State Dues:			
?	200.00		
Stanislaus/Merced	100.00		
Kern	100.00		
Monterey Bay	100.00		
San Diego	100.00		
Humboldt	100.00		
San Joaquin	100.00		
Bay Area	100.00		
Tri-County	100.00		
Misc. Deposit	25.00		<b>0</b> 457 04
Phone			\$ 157.04
Website			211.98 25.00
Domain (due November 2020)			25.00 168.00
Hosting (due March 2020) Postage			100.00
Printing/Supplies			
PO Box			174.00
State Annual Conference			282.00
National Biennial Conference Stipend			1,250.00
Secretary of State			20.00
TOTALS	\$1,733.03		\$2,282.02
CURRENT BANK BALANCE		\$8,733.53	

# FUNERAL CONSUMERS ALLIANCE OF CALIFORNIA 2020 PROPOSED ANNUAL BUDGET

# **Prepared by Katherine Ortiz, Treasurer**

ITEM	PROJECTED INCOME	PROJECTED EXPENSES
Annual State Dues Stanislaus/Merced Kern Monterey Bay San Diego Humboldt San Joaquin Bay Area Tri-County Donation Phone Website Domain (due November 2020) Hosting (due March 2020) Postage Printing/Supplies PO Box State Annual Conference National Biennial Conference Stipend Secretary of State	\$ 100.00 100.00 100.00 100.00 100.00 100.00 100.00 25.00	\$ 200.00 200.00 (24.95) (168.00) 100.00 100.00 82.00 300.00 1,250.00 20.00
TOTALS	\$ 825.00	\$2,252.00
CURRENT BANK BALANCE	\$9,355	.85

# 2019 Hotline Calls By Marjorie Bridges

#### **TOPICS**

- A. What to do to get ready, who to call at End of Life. Sick person or relative calling.
- B. Costs involved for funeral, etc. May need money to pay for arrangements, but interested in funeral home discounts, too, and may join because of that.
- C. They may call because of a controversy over cemetery plot; cemetery rules changed since purchase, or the cemetery won't allow what they want.
- D. Social workers, hospice workers call to ask what we do and how we are involved. We are NOT the funeral home to call upon death!
- E. People call to report changes to their file: address, mortuary, next of kin, etc.
- F. They want to transfer between FCAs after a move.
- G. How to sell their cemetery plot.
- H. Complaining about not being told prices at mortuary, or over-charging, misleading information. Tell them to do complaint with Cemetery & Funeral Bureau.
- Prepayment doesn't cover what they expect. May have to pay more to get what Mom wanted.

#### WHAT'S ON THE CFB WEBSITE

Names and titles of the 30-odd employees of CFB
Who is on the CFB Advisory Committee and webcasts of their meetings
Finding a funeral home address and license (but not phone or email)
All cemetery and funeral laws, with search function.
A form and instructions to submit a complaint
Disciplinary and enforcement actions, violations (by code) and fines
Administrative citations issued, violations (by code) and fines
CFB Publications—we are listed as a resource for consumers in Consumers Guide to Funeral and
Cemetery Purchases, including 650-321-6584 (mine) as our Hotline—where most people find
us.

# 2019 CALIFORNIA LEGISLATIVE REPORT By Marjorie Bridges, Bay Area FCA

#### Passed into Law

#### \*AB 795—Endowment Funds of Private Cemeteries (Irwin):

Allow private cemeteries to apply to the Cemetery and Funeral Bureau (CFB) if they wish to convert their endowment care funds from net income distribution method to unitrust distribution method after Jan. 1, 2021. They have to meet certain requirements about the fund's trustee and how much he/she is paid, and protects the principal and interest from being seized by a public entity or by a change of ownership.

#### \*SB 606—Professions & Vocations (Glazer):

This partly concerns the CFB, with amendments concerning the hierarchy: the director of the Dept. of Consumer Affairs appoints the chief of the CFB, who serves at the pleasure of the director. The powers and duties of the CFB shall be subject to review by the appropriate policy committees of the legislature. This review shall be performed as if the chapter is scheduled to be repealed on Jan. 1, 2024. (Another 5-Year Review!)

#### AB 1152—Vital Records (Holden):

This permits the California county recorders to dispose of local registrar's copies of birth and death records after two years with the approval and supervision of the State Registrar. The original copies of the records have to be on file in the State Registrar's office. A local health jurisdiction that exclusively serves cities may issue a record older than two years, if the record is the most accurate on file with the State.

#### SB 740—Unclaimed Life Insurance and Annuities Act (Mitchell):

This adds an article to the Insurance Code that provides standards for identifying a deceased individual whose death may require insurance benefits and proceeds to go to beneficiaries.

Previously the funds owed under a life insurance policy or annuity escheat to the state as unclaimed personal property if unclaimed and unpaid for more than 3 years. This bill requires an insurer to match its insured's name with deceased individuals in the U.S. Social Security Administration's Death Master File, using specified methods and a thorough search for one year. The company should give claim forms and instructions to beneficiaries within 15 days of them being located. A civil penalty would ensue for failure to meet the requirements.

#### AB 496—Business & Professions (Low):

This amendment to the B&P Code provides that the appointing authority (not just the Governor) has the power to remove a board member in the Dept. of Consumer Affairs, which licenses and regulates professions and vocations (including CFB). Effective Jan. 1, 2020.

Bills to be re-considered in 2020: SB 711, authorizing the CFB to investigate the premises where human remains are disposed; AB 200, naturalized Hmong U.S. veterans who died in California would be eligible for burial in California Veteran Cemeteries; AB 650, tracking violent deaths by sexual orientation and gender identity.