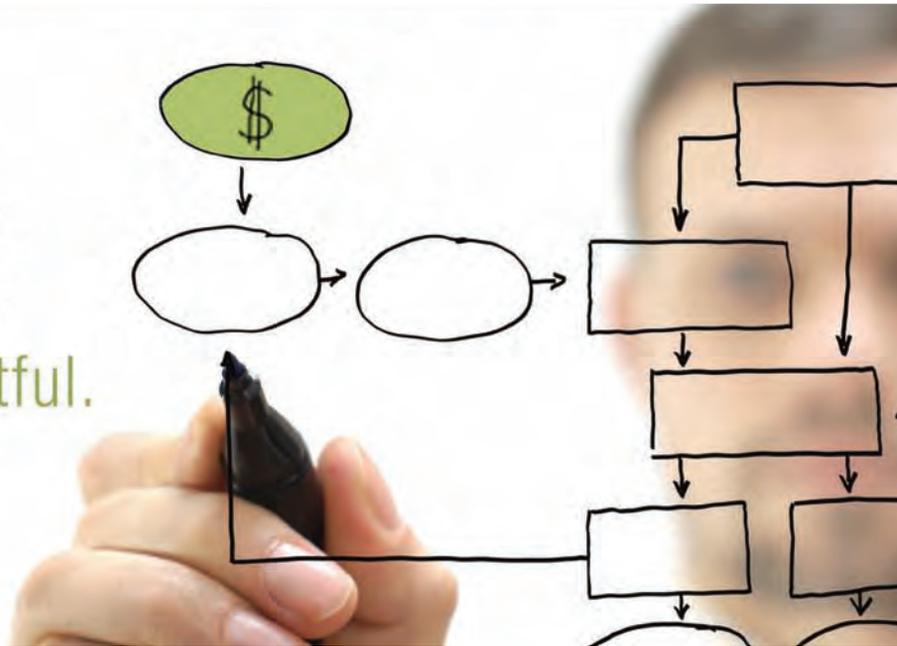


4th annual  
**FUNERAL SERVICE BUSINESS PLAN**

NOVEMBER 19-20, 2009  
 CLEARWATER BEACH • FLORIDA

Strategic. Smart. Insightful.



“This conference is at the top of my priority list for future years. Excellent educational sessions and outstanding networking opportunities.” - Brad Thomas, Thomas Family Funeral Home, Minot, N.D.

Meet  
 Your  
 All-Star  
 Lineup



Dr. Edith Churchman



Alan Creedy



Robin Heppell



Dan Isard



Bill McQueen



John McQueen



Nectar Ramirez



Dean Lambert

Come with Ideas...  
 and Leave with a Plan

The economy and your families are suffering, but you don't have to be. Invest two days in Clearwater Beach, Florida, with our expert team of advisers, and you'll leave with a profit-driven strategic plan that you can put to work as soon as you return home.

- Develop a business plan that's actionable, concise and achievable.
- Learn how to weed out costs and stop bleeding money.
- Find ways to incorporate new technologies to bolster income.
- Implement strategies to keep the selling price of funerals high even in a tough economy.

*Hepp says \$50 OFF*

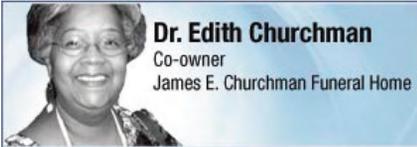
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800-260-1545 • [www.katesboylston.com/bizplan](http://www.katesboylston.com/bizplan)

“ The speakers were all very engaging, and I learned something new and useful from each. ”

- Jeanette Behm, Behm Family Funeral Homes, Geneva, Ohio

## Winning Strategies From Our All-star Lineup



**Edith** is a licensed funeral director and embalmer, and she is the only fourth-generation funeral director who owns and operates an African-American funeral home in Essex County, New Jersey. She has consistently increased business by focusing on a high level of service and not being afraid to develop new ideas to better serve families.



**Alan** began his career as a troubleshooter for a diversified holding company where he learned to analyze problems and develop immediate solutions. He formerly owned a group of funeral homes and cemeteries and is president of Trust 100, a network of funeral homes committed to increasing public awareness of the choices and options available for preplanning.



**Robin**, a licensed funeral director, helps funeral homes develop and improve business process solutions. He earned a degree in entrepreneurial management and is an expert in harnessing new technologies to bolster sales. He regularly holds webinars, blogs and facilitates conversations among funeral home operators to promote best practices.



**Dan** is one of the industry's top-ranked speakers for the past 15 years. During the past three decades, he has developed close relationships with funeral directors, cemeterians and combination operators across the United States, and he has established his reputation as a trusted adviser to business owners and their families.



**Bill** is a second-generation funeral director, a certified public accountant and has a law degree. He knows how to keep business thriving even in a tough economy, and he oversees the operation of his firm, serving as president. One of the ideas he's brought back to his business is price bundling. He serves as an officer for CANA.



**John** is a second-generation funeral director. He grew up in funeral service, and upon the untimely death of his father he assumed a leadership role at the young age of 23. Since then, John and his siblings have grown the family business from a single location in 1987 to the largest family-owned funeral establishment in the Tampa Bay area.



**Nectar** earned a degree in industrial engineering from Purdue University and an MBA from the Kellogg School of Management, Northwestern University. Her experience as a marketing and human resources consultant to Fortune 500 companies serves her well in her post as general manager for Options, Batesville's cremation business. Nectar and her team focus solely on the cremation market, and she works hard on developing new products, researching markets and training funeral directors.



**Dean** is vice president of marketing for Homesteaders Life Company. Before joining Homesteaders in 1998, he was founder and president of a marketing communications company. His connection to funeral service began in 1993 after he signed his first funeral home client and gained a passion for the funeral service mission. He holds an MBA in marketing management from Benedictine University.

**SAVE \$100**

Register by  
September 30<sup>th</sup>

[www.katesboylston.com/bizplan](http://www.katesboylston.com/bizplan)

“ The variety of topics and the quality of the presenters was amazing. Everyone stayed until the last topic was finished. ” - Mark Anderson, Joiner-Anderson Funeral Home, Statesboro, Ga.

## event schedule

**12 CEUs available.** Come to beautiful Clearwater Beach, and begin your 2010 Strategic Plan under the direction of funeral service's brightest minds and most innovative operators.

### Thursday | November 19

8:00 - 8:45 a.m.	<b>Networking Breakfast</b>
8:45 - 10:15 a.m.	<b>Step 1</b>
10:15 - 10:30 a.m.	<b>Break</b>
10:30 a.m. - 12:00 p.m.	<b>Step 2</b>
12:00 - 1:15 p.m.	<b>Lunch</b>
1:15 - 2:45 p.m.	<b>Step 3</b>
2:45 - 3:00 p.m.	<b>Break</b>
3:00 - 4:30 p.m.	<b>Step 4</b>
5:00 - 6:00 p.m.	<b>Cocktail Reception</b>

### Friday | November 20

8:00 - 8:45 a.m.	<b>Networking Breakfast</b>
8:45 - 10:15 a.m.	<b>Step 5</b>
10:15 - 10:30 a.m.	<b>Break</b>
10:30 a.m. - 12:00 p.m.	<b>Step 6</b>
12:00 - 1:15 p.m.	<b>Lunch</b>
1:15 - 2:45 p.m.	<b>Step 7</b>
2:45 - 3:00 p.m.	<b>Break</b>
3:00 - 4:30 p.m.	<b>Step 8</b>
4:30 p.m.	<b>Conference Ends</b>

## special event

**BONUS**

Wednesday | November 18 | 6 - 8 p.m.



## A Tour of the Anderson-McQueen Funeral Home

See firsthand how Anderson-McQueen converted an existing location at their NE St. Pete location so that it became a state-of-the-art facility that dazzles families. Witness how the McQueens' Legacy Café helps put families at ease, how the firm integrates audiovisual capabilities to provide top-notch service and how its Life Celebration Reception Center, Training Facility and Personalization Room separates their firm from the competition. Get ready to:

- Learn winning strategies that will bring your service to the next level.
- Find out how to maximize profit as co-owners John and Bill share lessons learned.
- Network with fellow conference attendees and share ideas as you enjoy wine and light refreshments.

This is one event you won't want to miss, so make sure to check in on time to take advantage of this special, profit-building offer!

**Space is limited. Register today!**

# Agenda:

Walk away with a plan in hand to make 2010 the best year in your firm's history. This program will leave you with a profit-driven strategic plan that can be put to work immediately.

12 CEUs  
Available

## Step 1: The Beginning of Your Strategic Plan

Alan Creedy, President, Trust 100

In this session, Creedy provides a metric overview of the profession and explains how to develop a strategic plan that will work for you and your firm. Learn practical approaches to team building and how to take advantage of opportunities that other firms miss.

## Step 2: Developing a Profitable Model

John & Bill McQueen, Co-owners, Anderson-McQueen Funeral Home

John and Bill have positioned Anderson-McQueen as the leading funeral service operation in their area. They'll share how to bring leading-edge marketing principles to your firm. You'll also discover how to respond to demographic shifts to maximize profits.

## Step 3: Selling More Preneed

Dan Isard, President, The Foresight Companies

One of the nation's top experts on funeral home strategy, Isard provides the tools you need to evaluate insurance and trust companies. He'll walk you through balance statements, and he'll set you on the path you need to be on to sell more preneed.

## Step 4: Maximizing Profits Through Marketing

Robin Heppell, Owner, Heppell Funeral Solutions

In this session, Heppell, a fourth-generation funeral director and technology guru, shows how using new forms of media can increase customer satisfaction, bring in additional families and increase sales. Design a unique selling proposition that will pay dividends throughout the year!

## Step 5: Honing Your Service Model

Dr. Edith Churchman, Co-owner, James E. Churchman Funeral Home

Dr. Churchman will share best practices to make sure your plan will get off the ground. From personnel, smart financial practices, community outreach and delivering personal service, she'll help you build the type of customer loyalty that will pay off in dollars.

## Step 6: Understanding Cremation Consumers

Nectar L. Ramirez, General Manager, Options by Batesville

Ramirez brings you into the mind of cremation consumers so you can understand how they think and how you can profit from their attitudes and values. Learn how to establish trust, hold a significant service and personalize your offerings so you can optimize profits.

## Step 7: Furthering Your Strategic Plan

Dan Isard, President, The Foresight Companies

Learn techniques that will increase your revenue per call and your case count by at least 5 percent. In the process, you'll also increase the value of your business 25 percent. And even better, your staff will be happier and you will, too. Sound impossible? Let Dan show you how.

## Step 8: Preneed Panel

Moderated by: Dean Lambert, Vice President of Marketing, Homesteaders Life Insurance Co.

Understanding the benefits and risks of price-guaranteed versus non-guaranteed prearrangements is important to the long-term success of your funeral home. Join Dean Lambert and a panel of funeral directors who will discuss the choices they have made and why.

“ I would 100 percent recommend your conference to anyone involved in funeral service. ” - Greg Hackman, Hackman Family Funeral Homes, Sturgis, Mich.

## Hilton Clearwater Beach Resort

400 Mandalay Avenue • Clearwater Beach, Florida 33767  
[www.clearwaterbeachresort.com](http://www.clearwaterbeachresort.com)



Having just undergone a \$26 million refurbishment, this popular beachfront property spanning 10 acres along the Gulf of Mexico has been transformed top to bottom into the ideal setting for a relaxed business meeting.

Just 30 minutes from Tampa International Airport and within walking distance to the best restaurants and shops of charming Clearwater Beach, this family-friendly, 416-room hotel has become a sleek, luxurious property with remodeled contemporary guest rooms; a noticeably expanded lobby that takes full advantage of newly-opened space, resulting in an inviting, warm environment conducive to gathering, socializing and relaxing; enlarged meeting space; new restaurants; lush landscaping; and an entirely new sense of arrival for guests with a redesigned entranceway with full, brick-paved circular drive and tropical landscaping that flows into the completely reconfigured, marble-floored reception area.

The hotel has everything to make your Clearwater Beach business trip memorable. A professionally trained staff will provide upscale service throughout your stay. The resort is located next to Pier 60 and in walking distance of the area's best restaurants and activities.

# SAVE \$100

Register by  
September 30<sup>th</sup>

[www.katesboylston.com/bizplan](http://www.katesboylston.com/bizplan)

Hepp says  
\$50 OFF

## 100% Money-Back Guarantee

Every Kates-Boylston conference comes with a 100% Money-Back Guarantee. If, after attending the conference, you don't take home ideas you can put to work immediately, or if you're not satisfied for any reason, we'll refund your entire registration fee — no questions asked!

## Important Information

**Price:** \$995 (non-subscribers); \$895 (subscribers to any KB publication)  
**Special:** Take an additional \$100 off by signing up by Sept. 30, 2009

### Hotel Discounts & Reservations:

**Hilton Clearwater Beach Resort**, 400 Mandalay Ave., Clearwater Beach, Florida 33767. Attendees should call the hotel at 727-461-3222 by Oct. 18, 2009, to take advantage of the discounted single/double room rate of \$189 a night. Be sure to identify yourself as a Funeral Service Business Plan attendee to receive the discounted room rate. Reservations made after this date are on a space-available basis only, and the discounted room rate cannot be guaranteed.

### Airline and Car Rental Discounts:

We have negotiated a special discount with United Airlines. In order to take advantage of this offer of 10% off published domestic airfares, call World Travel at 888-602-6534 or call United Airlines directly at 800-521-4041 and refer to File #582PV. Avis Car Rental is offering conference attendees discounted rates. To take advantage of these rates, please call 800-331-1600 and mention AWD #T706699 to receive the discount.

**Space is limited. Register Today!**

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# FUNERAL SERVICE BUSINESS PLAN

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“ I cannot express how much I enjoyed the conference, and more importantly, how it jump-started me as a funeral director and business owner. ”

- Greg Hackman, Hackman Family Funeral Homes, Sturgis, Mich.



## BUSINESS PLAN 2010 REGISTRATION FORM

Reserve your place today by faxing this form to **301-527-1316** or by registering online at [www.katesboylston.com/bizplan](http://www.katesboylston.com/bizplan)

If you have any questions or prefer to speak with customer service to register, please call 800-260-1545.

**Registrant's Information:** (if registering more than one person, fill out name, title and email for each)

1. NAME \_\_\_\_\_ TITLE \_\_\_\_\_

EMAIL \_\_\_\_\_

2. NAME \_\_\_\_\_ TITLE \_\_\_\_\_

EMAIL \_\_\_\_\_

3. NAME \_\_\_\_\_ TITLE \_\_\_\_\_

EMAIL \_\_\_\_\_

**Company Information:**

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_ FAX \_\_\_\_\_

**Method of Payment:**

**TOTAL PAYMENT \$** \_\_\_\_\_

Bill Me Later

Check or money order enclosed

Please Charge My:      

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

### REGISTRATION FEES

**Funeral Service Business Plan 2010**

**Before September 30:**

Kates-Boylston Subscriber: \$795

Non-subscriber: \$895

**After September 30:**

Kates-Boylston Subscriber: \$895

Non-subscriber: \$995

### 4 WAYS TO ORDER

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Call: 800-260-1545

Mail: FSBP2010 C1186

Two Washington Center

9737 Washington Blvd., Ste. 100

Gaithersburg, MD 20878-7364

**Tax ID Number:** 26-3623792

**Cancellations:** If you are unable to attend, you are welcome to send a substitute. Otherwise, you can cancel in writing 10 business days prior to the conference to get a full refund. After that time, there is a \$150 cancellation fee. Registrants who do not cancel and do not attend are liable for the full fee.

C1186