

# FUNERAL PLANS-CANADA NEWS

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## “REMEMBER WHEN...”

Developing preneed leads is an enormous challenge. With your daily focus on at-need funerals and marketing tools lacking the lustre they may once have had, preneed can become a daunting task. Our marketing strategies get results while allowing you focus on your business.

The “Remember When” program is bringing qualified leads to funeral homes with 2.5% - 6% response rates. Sales from the leads are higher than experienced through other lead sources because of the unique message we have designed.

“Remember When” is cost-effective and will position you as the caring leader in funeral services in your community. We will provide you with a complete look at the program plus a detailed implementation plan free of charge and with no obligation.

**See what Funeral Home’s who have witnessed this amazing program first-hand are saying...**

*“Our recent foray into public seminars to promote our prearrangement program has provided both interesting and profitable results. The cooperation, generosity and assistance provided by Funeral Plans - Canada is most appreciated and proved invaluable in presenting seminars.”*

**- Jim Mackey, Mackey Funeral Home, Lindsay, ON**

*“We were looking for an advantage in our area for generating pre-leads and pre-business, and this was unique, there was no-one else around doing it, and we thought it was a great opportunity to tell people about what we do, and it seemed easy to implement, so we thought we’d try it. We have absolutely no regrets. Implementing the program was incredibly simple. People love the presentation video of “Remember When”. You had people laughing at some points, you had people crying at some points. The response that we had after was unbelievable - everybody loved it. Our leads were great. With our Direct Mail out campaigns, we’ve usually been around .6 percent of a response, and it’s been closer to 6 percent for this, so it’s unbelievable, the leads that we’ve been getting from it.”*

**- David Erb, Edward R. Good Funeral Home Ltd., Waterloo, ON**

The “Remember When” presentation is a powerful addition to your preneed program.

- Show you are the authority in advanced planning for your community.
- Provide families the tools for preserving their treasured family memories.

**Don’t let your family’s memories become buried treasure.**

Please take a moment to send in the enclosed fax-back form or contact our office at 1-888-428-4444 for more information. You may also visit our website at [www.funeralplans.net](http://www.funeralplans.net) to view additional details.



Funeral Plans - Canada

## ***"Remember When" Seminar Marketing Program Request for Information***

If you would like more information on this powerful seminar program, please fill out the form below and fax it to Funeral Plans-Canada at 1-519-584-7292. You may also visit our website at [www.funeralplans.net](http://www.funeralplans.net) to learn about how your funeral home can benefit from including ***"Remember When"*** in your preneed program.

To speak with a Funeral Plans-Canada representative, contact our office at 1-888-428-4444, or send us an email at [info@funeralplans.net](mailto:info@funeralplans.net).

**Funeral Home Name:** \_\_\_\_\_

**Contact Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone #:** \_\_\_\_\_

**YES!** I would like more information on the ***"Remember When"*** Seminar Marketing Program.

In an effort to reduce paper consumption we have eliminated a return envelope and request a Fax-Back reply form. We hope this does not inconvenience you. Thank you.



FUNERAL PLANS-CANADA

## ADMINISTRATION SUPPORT

We are here to answer all of your questions regarding administrative procedures and we encourage you to call our office as often as you need. The following are a few guidelines on procedures to address some recurring questions and concerns:

- Marketing allowances on post dated applications are paid on the date the application is processed
- Pre-authorized chequing dates are available from the 1st to the 28th of the month
- A first payment and a void cheque must accompany each pre-authorized chequing contract in order to process the application
- Please ensure all pertinent information is clearly printed on the applications (date of birth, address, etc.)
- A copy of each of the funeral service contract (goods & services), and the insurance application (insurance portion) must be included with every application (including a single/one pay)
- Please ensure all medical questions are correctly answered for 3 pay, 5 pay, and 10 pay plans
- Please ensure the correct payment factor is used
- Unity Life does not have a 2 year plan. If a client wishes to pay in full within two years to avoid premium charges, please set them up on a 3 pay, 5 pay, or 10 pay
- When calling for Death Claims, Payout Amounts or other Administration questions, please feel free to ask any of our trained staff. There are many of us happy to help you!

## CONTACTS

KATHEY RETTINGER:	- Office Operations
TERESA HALLETT:	- Administration Services - Marketing Allowance Inquiries - Insurance Product Information
BRANDIE ZABOLOTNEY:	- Administration Services - Invoicing - International Welcome Home Society
STEPHANIE JAQUES:	- Marketing Programs - Marketing Material
RHONDA HEWITSON:	- Direct Mail Campaigns - Marketing Material
TANYA REITZEL:	- Reception - Supply Orders
DANIELLE MCKAY:	- Customer Service

## PRIVACY LEGISLATION

As of January 1, 2004, the Personal Information Protection and Electronic Documents Act (PIPEDA) became the law for all organizations that collect personal information in the course of commercial activity.

Our businesses are held accountable for the personal information collected from individuals and used during the course of commercial activities. Our businesses are accountable to both individuals whose personal information was collected and to the Federal Privacy Commissioner.

Individuals have the right to request that your business reveal to them the personal information collected about them and the uses this information was put to. Our businesses are required to have an internal complaints procedure to which the individual can voice concerns. If the internal process fails to satisfy the individual's concerns, the individual may complain to the office of the Federal Privacy Commissioner. The Federal Privacy Commissioner may audit our businesses' personal information practices as part of an independent investigation.

We will keep you informed regarding any ongoing changes that may affect the administration of our services and products to you.

For further information, you may go to [www.privcom.gc.ca](http://www.privcom.gc.ca) and click on the Privacy Legislation link on the left-hand side of the page.

## 2004 EASTERN CONFERENCE REVIEW

On March 3, 2004 our Annual Ontario Conference was held at the Isaiah Tubbs Resort in Picton, Ontario. We were extremely pleased with the turn out. The casino fun night was a great way to kick off our conference and was enjoyed by all.

Our agenda offered our valued customers the opportunity to learn more about the importance of pre-planning, increased marketing knowledge as well as topic focused discussions with our peers on many important subjects. A very successful day ended with our presentation dinner.

Our conference continued the following morning with Sheila Nunn discussing pre-need marketing systems and lead generation, a very informative and a great finale to a successful conference.

It is always a pleasure to spend time with our valued customers and we want to recognize and offer a special thank-you to our guest speakers Tom Payton from MacCoubrey Funeral Home, Mike Fitzgerald of Toronto, Sheila Nunn, and both Elizabeth Duett and Quinn Eagan from our U.S. office. We look forward to seeing you at our 2005 conference.

- Maurice Irvine

## 13 TRIP QUALIFIERS TO-DATE!

- Richard Henseleit - Springfield Funeral Home, Kelowna, BC
- Sheila Silvester, Springfield Funeral Home, Kelowna, BC
- Nanette Fahey - Edward R. Good Funeral Home, Waterloo, ON
- Katherine Downey - Marshall Funeral Home, Richmond Hill, Lathangue & Skwarchuk Funeral Home, Bradford, and Kopriva Taylor Funeral Home, Oakville, ON
- Steve Redmond - James Reid Funeral Home, Kingston, ON
- Tim Cummings - McKinlay Funeral Home, Chatham and Ridgetown, ON
- Ian MacDonald - Funeral Plans - Canada
- Reg Clark - McInnis & Holloway Funeral Home, Calgary, AB
- Michaelae-Sue Goldblatt - Benjamin's Park Memorial Chapel, Toronto, ON
- Chet Hartling - McQuinty Funeral Home, North Bay, ON and Miron-Wilson Funeral Home Ltd., Timmins, ON
- Dave Perry - McCall Bros. Funeral Directors Ltd., Victoria, BC
- Tonia Catcher - Funeral Plans - Canada
- Jeff Mardling - Logan's of Parry Sound, Parry Sound, Mackey Funeral Home, Lindsay, and May Funeral Home, Markdale, ON

**Congratulations and we will see you in Costa Rica in March!**

**You still have until December 31, 2004 to qualify!** If you require any additional information, please contact our office at 1-888-428-4444. Announcements on the 2005 trip will be made very soon!

## UNITY LIFE CONTESTS

Funeral Plans - Canada and Unity Life are excited to offer giveaways for the following contests:

- We will be giving away a Travel Shoe Bag for the highest percentage increase of sales from September to October.
- For every contract received in November, you will be entered into a draw for a Travel Suit Bag.

**Good luck!**

We would also like to congratulate the following people for winning our previous contests:

- Nanette Fahey, from Edward R. Good Funeral Home, will receive a Golf Bag for sending in the most contracts in August.
- Dave Perry, from McCall Bros. Funeral Home, will receive a Duffle Bag for the most Multi-Pay contracts received in September.

**Congratulations!**

**1-888-428-4444**

**www.funeralplans.net**

## **Staff Appointments**



***Tyler Shannik***  
***Account Executive for Southwestern Ontario***

Funeral Plans-Canada has appointed Tyler Shannik to the position of Account Executive for Southwestern Ontario. Tyler's qualifications include a Funeral Directors License, Insurance License and Securities License as well as a Financial Management Advisor designation.

He has an extensive sales and business development background and was most recently employed with Edward Jones. Tyler's experience and knowledge ensure he will meet his clients' unique challenges. Welcome Tyler.



***Kathey Rettinger***  
***Executive Director***

Funeral Plans-Canada is pleased to announce the appointment of Kathey Rettinger to our newly created position of Executive Director. Kathey will be responsible for overseeing our entire Office Operations. Her superior leadership skills along with 18 years of experience in the Financial Services industry with strong knowledge in Human Resources field will compliment the team and lead to success in the role and the operations. Welcome Kathey.



## ANNOUNCEMENTS



### EXCITING NEWS

You can now access our website at [www.funeralplans.net](http://www.funeralplans.net).

You will be able to obtain important information on:

- Marketing Systems
- Direct Mail
- Training Programs
- Travel Protection Plan
- Financial Products

Now all “Affiliated Funeral Homes” can be linked to our website. If you wish to be linked, please contact our at 1-888-428-4444.

#### WHAT'S NEW...

The “Importance of Planning Ahead” and “Answers for Your Preplanning Needs” brochures and “To My Family” books are available in French. Please let us know if you would like samples.

#### UPCOMING EVENTS

- The FPC Care Centre online reporting will soon be available on our website.
- FPC's Annual Western conference to be held October 28-29, 2004 at the Banff Park Lodge in Banff, AB.

### FPC STAFF

#### Director of Canadian Operations

Sheila Nunn - [sheila@funeralplans.net](mailto:sheila@funeralplans.net)

#### Executive Director

Kathey Rettinger - [kathey@funeralplans.net](mailto:kathey@funeralplans.net)

#### Marketing

Stephanie Jaques - [steph@funeralplans.net](mailto:steph@funeralplans.net)  
Rhonda Hewitson - [rhonda@funeralplans.net](mailto:rhonda@funeralplans.net)

#### Administration

Danielle McKay - [danielle@funeralplans.net](mailto:danielle@funeralplans.net)  
Teresa Hallett - [teresa@funeralplans.net](mailto:teresa@funeralplans.net)  
Brandie Zabolotney - [brandie@funeralplans.net](mailto:brandie@funeralplans.net)

#### Reception

Tanya Reitzel - [tanya@funeralplans.net](mailto:tanya@funeralplans.net)

#### Preplanning Division Manager

Ian Mossop - [ian@funeralplans.net](mailto:ian@funeralplans.net)

#### Account Executives

##### Ontario

Maurice Irvine  
Katherine Downey  
Tyler Shannik

##### Atlantic Canada

Sheila Nunn  
Tyler Shannik

##### Alberta and British Columbia

John Welsh

##### Manitoba, Saskatchewan, and Northwestern Ontario

Corey Pelland

#### Preplanning Directors

Nanette Fahey  
Chet Hartling  
Ian MacDonald  
Julie Proulx  
Tonia Catcher  
Lorene Peters  
Kevin Belanger