



Pre-Approached Letters

Networking

Sending Video Emails

Time Management

Handwritten Cards

Life Planning Seminars

Setting up Lunch and Learns

Accomplishing Your Goals

*Meet with one **Couple** Per Day (2 People).*

*This equals 10 People per week or
10 Family Planning Guides per Week.*

*Accomplishing this weekly totals:
40 Family Planning Guides Per Month.*

*Selling Half of those **Equals 20 Sales per Month**
240 Sales Per Year.*

***This has been my selling model for almost 30 years and I
have sold over one million dollars per year at least 20 times.***

***Give a report monthly to the funeral home of your
Unfunded as well as Your Funded Funerals.***

Lead Card

DATE	LEAD #	PHONE
NAME		
ADDRESS		ZIP
DECEASED	RELATIONSHIP	
BURIAL IN	AT NEED <input type="checkbox"/> PRENEED <input type="checkbox"/>	
MARKER	SET?	VAULTS?
E.R.G.?	COUNSELOR	NO.
APPOINTMENT		
REMARKS		

Preparing For Your Day

Family Planning Guide

VITAL STATISTICS RECORD

Full Name _____ Date _____
Street _____ City _____ State _____ Zip _____
Email Address _____
Phone _____ Social Security # _____
Birthplace _____ Birthdate _____
Father's Name _____
Mother's (Maiden) Name _____
Marital Status Married Divorced Never Married Widowed
Spouse's Name _____ Date Married _____ Place _____ Death Date _____
Spouse's Name _____ Date Married _____ Place _____ Death Date _____
Doctor's Name _____
Race _____ Gender _____

PERSONAL HISTORY

Occupation _____ Employer _____
Position Held _____ How Long _____ Retired _____
Resident Cities, Years _____

Education Level _____
Military: War _____ Branch _____ Rate or Rank at Discharge _____
Enlistment Date/Place _____ Discharge Date/Place _____
Service Number _____ County Recorded _____
Lodges/Memberships/Church & Public Offices Held _____

Newspaper _____ Picture _____
Newspaper _____ Picture _____

LOCAL EMERGENCY CONTACTS TO BE NOTIFIED AT NEED

Name	Address	Email	Phone
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Most of Us Prepare for the Possible...
Why Not Prepare for the Inevitable.



The Funeral... Is for the Living.



The Funeral:

- Recognizes the value of life and confirms that a life well-lived has ended
- Helps survivors face the reality of death
- Gives survivors the opportunity to express their love for each other
- Fulfills the bereaved's need for emotional support

Someone at Some Future Date
Will Be Responsible for Making
Your Funeral Arrangements...
and Paying for Them.



One Way of Handling This Responsibility is to Shift the Burden to Your Family.



Funeral arrangements would then become part of a seemingly endless number of things that would need attention at your death.

Someone Will Need To:

Notify:

Doctor
Coroner
Funeral Director
Cemetery or
Memorial Park
Clergy
Relatives and Friends
Pallbearers
Insurance Agents
Unions and Fraternal
Organizations
Newspapers
Organist

Select:

Cemetery Property
Funeral Service
Casket
Vault or Outer Container
Clothing
Flowers
Music
Thank You Announcements
Transportation
Time and Place
for Funeral
Time and Place
for Visitation

Provide:

Vital Statistics About
the Deceased
Addresses of all People Who
Must be Notified
Arrangements for
Out-of-Town Visitors

In Addition To:

Answering sympathetic phone calls, cards and letters.
Greeting friends and relatives when they call.

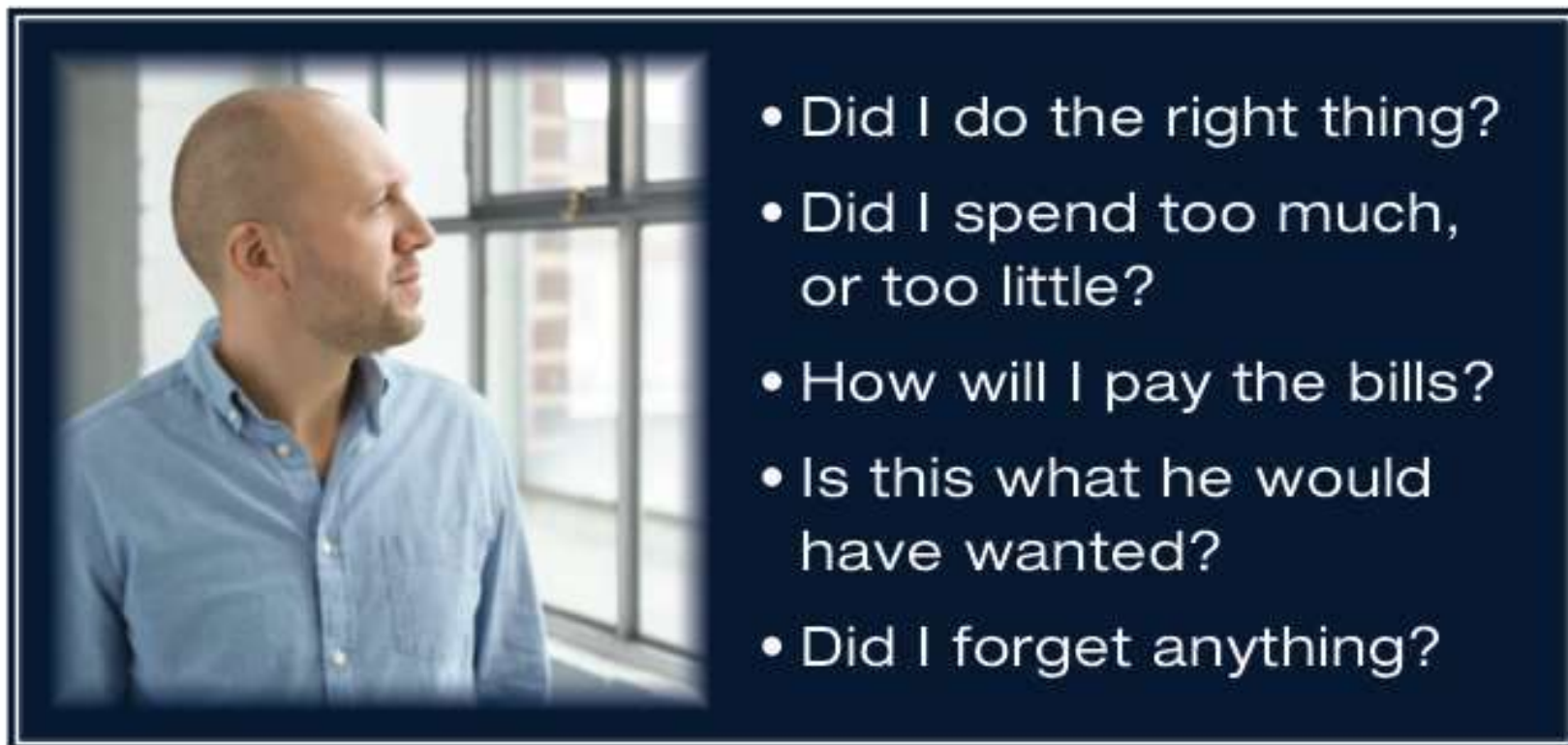
And Arrangements Must be Made to Pay for the Following Immediately!

Doctor	Drugs	Cemetery	Organist	Transportation
Hospital	Ambulance	Interment Fee	Florist	Memorialization
Nurses	Funeral	Clergy	Clothing	

These Decisions Will Need to be Made by
Someone Close to You... Perhaps Alone...
Unprepared... With Other Things on Their Mind...
at Most Likely the Worst Time of Their Lives.



Even After the Funeral, There May be Lingering Doubts.



Another Way to Face This Issue
is Together... Today... Without
the Pressures of Time and Grief...
By Planning Ahead.



“Advance funeral planning gives you the peace of mind that comes with knowing your funeral arrangements are taken care of, while lessening the burden on your survivors.”

American Association of Retired Persons



Planning Ahead Will:

- Spare your loved ones from having to make difficult decisions at a time of deep, personal loss
- Provide a service in accordance with your wishes
- Eliminate family disagreements over what you would have wanted

In Addition, There Are Sound Financial Reasons for Planning Ahead.

Projected Funeral Costs:

YEAR	COST
2015	\$14,900
2010	\$12,500
2005	\$10,200
2000	\$8,900
1995	\$6,600
1990	\$4,100



- Protects against inflation
- Conserves life insurance
- Offers convenient payment terms

The Choice is Yours...

At-Need Arrangement



Pre-Arrangement



What is Involved in Planning Ahead?

Professional Services



Merchandise



Our Standard Funeral Service

is the same for all families,
and includes:

- **Service**
- **Preparation**
- **Professional Care**
- **Staff and Vehicles**

Price increase according to the quality of casket chosen.

CASKETS

Though caskets come in many styles, colors, and prices, there are really only two basic types:

Wood



Metal



WOOD CASKETS



Hardwood caskets are assembled by skilled craftsmen from only the choicest woods, and are given the same care and attention to detail afforded a piece of fine furniture in the home.

Although non-protective, they are chosen primarily for their warmth and beauty, with the individual graining patterns making each casket truly unique.

METAL CASKETS



The finest protective caskets are made of bronze or copper. These metals are naturally resistant to rust and corrosion.

Other Protective Caskets are made of various gauges of steel. The type and thickness of the metal, the workmanship and interior fabric, will all affect the quality and price of the casket.

PROTECTIVE CASKETS

Most Metal Caskets Are Protective



Protective Caskets are designed to completely resist the entrance of water and gravesite substances.

Protective Caskets can be identified by this rubber gasket that helps seal the top with the bottom.

ESTIMATE WORKSHEET

NAME _____
SERVICE _____
CASKET _____
CASKET _____
VAULT _____
VAULT _____

CASH ADVANCES

CLERGY _____
VOCALIST _____
ORGANIST _____
FLOWERS _____
COMPLETE OBITUARY _____
MEMORIAL PACKAGE _____
HAIRDRESSER _____

DEATH CERTIFICATES

(# _____)
ESCORT _____
OPEN & CLOSE _____
VAULT SETTING _____
LETTERING _____
OTHER _____

TOTAL CASH ADVANCES

SUB TOTAL _____

TAX _____%

TOTAL _____

PAYMENT PLAN

1 YEARS SAME AS CASH MONTHLY = _____

NUMBER OF PREMIUMS PAID X 11 = _____

EARLY PAYOFF BALANCE DUE = _____

PLUS \$150.00 CONVERSION FEE = _____

ADVANTAGES: _____

DATE _____ COUNSELOR _____

ESTIMATE WORKSHEET

(Traditional)
CREMATION

NAME	<u>The Jones Family</u>	<u>MARY</u>	<u>John</u>
SERVICE	<u>Traditional Viewing + Service</u>	<u>6730</u>	<u>7090</u>
CASKET	<u>Midnight Black 18ga Steel JPS- 146853</u>	<u>2275</u>	
CASKET	<u>Mountain Oak Rental</u>	<u>146853</u>	<u>895</u>
VAULT	<u>Guardian Vault</u>	<u>1230</u>	
VAULT	<u>CREMATION vault</u>		<u>175</u>
CASH ADVANCES			
CLERGY		<u>150</u>	<u>150</u>
VOCALIST		<u>100</u>	<u>100</u>
ORGANIST		<u>125</u>	<u>125</u>
FLOWERS		<u>250</u>	<u>250</u>
COMPLETE OBITUARY		<u>300</u>	<u>300</u>
MEMORIAL PACKAGE		<u>130</u>	<u>130</u>
HAIRDRESSER		<u>40</u>	<u>Free</u>
DEATH CERTIFICATES			
(# <u>6</u>) <u>15.00 ea</u>		<u>90</u>	<u>90</u>
ESCORT		<u>included</u>	<u>included</u>
OPEN & CLOSE		<u>1530</u>	<u>860</u>
VAULT SETTING			
LETTERING		<u>175</u>	<u>175</u>
OTHER			
TOTAL CASH ADVANCES		<u>2890</u>	<u>2180</u>
SUB TOTAL		<u>13,125</u>	<u>10,340</u>
TAX <u>7</u> %		<u>271.95</u>	<u>101.50</u>
TOTAL		<u>13,396.95</u>	<u>10,441.50</u>
PAYMENT PLAN		<u>Mary</u>	<u>John</u>
1 YEAR SAME AS CASH MONTHLY =	<u>260.38</u>	<u>181.58</u>	
NUMBER OF PREMIUMS PAID X 11 =	<u>2864.18</u>	<u>1997.38</u>	
EARLY PAYOFF BALANCE DUE =	<u>10,532.77</u>	<u>8444.12</u>	
PLUS \$150.00 CONVERSION FEE =	<u>10,682.77</u>	<u>8594.12</u>	
ADVANTAGES:	<u>1. Peace of Mind</u>		
	<u>2. Gift to Family</u>		
	<u>3. Guarantees the Price</u>		
DATE	<u>6-6-2021</u>	COUNSELOR	<u>Shanda Luthridge</u>

PreNeed & Pogo Sticks

