



PRESIDENT'S NOTE

"I do not think that there is any other quality so essential to success of any kind as the quality of perseverance. It overcomes almost everything."

-John D. Rockefeller



Legendary entrepreneur and philanthropist John D. Rockefeller once famously said, "I do not think that there is any other quality so essential to success of any kind as the quality of perseverance. It overcomes almost everything." I cannot think of a better word than perseverance to describe how our industry fought through the pandemic, and how deathcare professionals are now managing operational challenges brought on by skyrocketing inflation.

One of those operations challenges is the recognition of diminished market value of trust assets during this general downturn in the stock market. The past couple of months some of our client firms have called to inquire about the performance of their trusts' investments. We want to remind you that FSI does not have any control over the investment of the trusts - FSI is the recordkeeper. The trustees that FSI works with are skillfully managing the trust funds to mitigate against losses and position the trusts for future market conditions.

Notwithstanding the perceptions of economic slowdown, many deathcare professionals have been telling us that celebration of life services is at or near pre-pandemic levels. The increase in such services should put the industry on course to finish the year on a strong note, thanks to perseverance and resilience - and that is something to celebrate and truly be thankful for during the holiday season at the end of the year.

A handwritten signature in black ink, appearing to read "Bill Williams". The signature is fluid and cursive.

Bill Williams
President and CEO, Funeral Services, Inc.

August and September were busy months for the FSI team.

In mid-August, **Paul White**, our senior vice president who oversees client development and marketing, and **Wendy Russell Wiener**, our general counsel, both attended the Cremation Association of North America's (CANA) 104th Annual Cremation Innovation Convention. Paul spent time at our exhibition booth meeting clients and attendees, while Wendy had the privilege of speaking in her capacity as a trainer for CANA's Crematory Operations Certification Program.

And during the first week of September, Bill Williams, our president/CEO, and Wendy attended Kates-Boylston's Technology Think Tank event, where they led a session about the digital customer journey. Bill and Wendy provided insight into using technology to build a robust sales pipeline and leveraging digital tools to manage preneed records.

We look forward to seeing you at future industry events later this year.



Paul White,
Senior Vice President, FSI



Wendy Russell Wiener,
General Counsel, WRW Legal

TECH SPOTLIGHT PRISM

Managing your trust program does not have to be a time-consuming, paper-intensive process. PRISM, our secure, online trust recordkeeping and administration platform, provides you with an easy-to-implement solution that simplifies managing your trust and sales programs.

PRISM's mobile-friendly technology ensures that deathcare professionals have at their fingertips the necessary tools, resources and real-time information they need to serve consumers in an increasingly digital environment. Plus, our live client support chat feature lets you connect online with an FSI team member during business hours. No more leaving a message or chatting with a bot.

To learn more about how PRISM can help you grow your trust program, contact ClientServices@FSITrust.com.

REGULATORY UPDATE FROM WRW LEGAL

Back to Basics: Identification of Remains the Most Important Step in Deathcare

Even the mention of a recession drives litigation and regulatory discipline up. I handled more disciplinary and civil cases during the Great Recession (2007-2009) than at any other time in my nearly 30-year career as a deathcare regulatory lawyer. And there is one

simple and undeniable fact regarding nearly every case: it involved the identification of the decedent's remains.

Here are a few best practices for identifying and maintaining control and custody of remains from first call to final disposition.

1. It all starts with correct identification

Most forms collect the decedent's name, sex, date of birth and date of death. Better forms gather additional identifying information such as age, current height, current weight, hair color and eye color. The best forms get all of that plus requiring descriptions and images of visual markings such as tattoos, scars and piercings. The point here is that the decedent may have changed physically when compared to, say, the description on a driver's license - and you want to have the most current information available.

2. Maintain the chain of custody

Failure to confirm identification throughout the entire period within which the remains are in the control of the funeral establishment leads to errors and litigation risk. Take extra time to check and document the identification and location of the decedent at every single stop along their deathcare journey at the funeral home or crematory. **3.**

Documentation is everything!

In a world that values transparency, the only way for the funeral home or crematory to prove that it properly identified the decedent and maintained custody of the remains is through records that are created throughout the process. Those records should be measured by my four-part test: the CCNP (Complete, Consistent, Neat, Proud) test.

- A. Are the records **Complete**? Every box should be filled in. If the item called for is not applicable, indicate that - don't leave a blank.
- B. Are the records **Consistent**? Refrain from getting lazy where information must be duplicated.
- C. Are the records **Neat** and something you can be **Proud** of? The records you create are the primary way you express the care you took with the decedent.

Takeaway: Good records and forms that pass the CCNP test can save your business from regulatory and civil damages.



FSI executives regularly contribute to our profession's leading publications with thought leadership articles. The articles are written with you in mind - to provide advice, new ideas and in-depth insights on issues our profession faces.

Here are brief summaries of several recent stories featuring FSI:

Bill Williams Shares How Technology Can Help Blunt Inflation's Impact in Catholic Cemetery



Inflation has become a real issue, and likely will remain a challenge for the foreseeable future. In the July issue of Catholic Cemetery Magazine, FSI President/CEO Bill Williams explores how adopting today's digital tools can lessen the cost of rising inflation while providing families with superior service during their time of need.

[Read more here.](#)

Wendy Russell Wiener Explains in Memento Mori Why It's Essential to Update Your Forms

Having well-designed forms that collect the right information can reduce time spent on paperwork and file management, so you have more time to spend with families. FSI General Counsel and WRW Legal's Wendy Russell Wiener shares with Memento Mori readers how updating documents can be a simple step to improve compliance. [Learn more here.](#)

Bill Williams Discusses How Technology Can Help Improve Multi-Location Operations

Mergers and acquisitions are a fact of life in the deathcare industry, which means an increasing number of professionals will be managing multiple funeral homes and cemeteries. In an article for America Funeral Director, FSI President/CEO Bill Williams highlights three ways new technology can improve managing preneed trust and sales programs for multi-location operations. [Find out more here.](#)

FSI DEPARTMENT SPOTLIGHT:

INFORMATION TECHNOLOGY

At FSI, we are huge believers in the power of technology to help transform your business. Our growing team of information technology (IT) experts is always proactively exploring ways to enhance our comprehensive suite of digital tools so you can spend less time on recordkeeping and administration and more time meeting with families and being active in your community.

In addition to helping you manage your trust business, our skilled software engineers are continually updating our security technology so you can rest well at night knowing your company's data is safe and secure.



Prakash Mohan
Chief Technology Officer



Mike Brossette
Information Technology Director



Ji "Jay" Sungsoo
Software Developer



Mudassir Mohammed
Lead Software Developer



Suresh Venkatesan
Lead Software Developer



Polina Volkova
Lead Software Developer

IMPORTANT FSI DATES TO REMEMBER



**2022 NFDA International
Convention & Expo**
*Baltimore Convention Center,
Baltimore, MD*
Visit Us at Booth #2914!



Veteran's Day
*FSI offices will be closed in
observance of Veteran's Day*



Thanksgiving
*FSI offices will be closed in
observance of Thanksgiving*



Christmas Eve, Christmas Day
*FSI offices will be closed in
observance of Christmas*



New Year's Day
*FSI offices will be closed in
observance of New Year's Day*

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