



FINDING A SENSE OF "NORMALCY" IN OUR DAILY LIVES.

PRESIDENT'S NOTE

I am confident most of you feel as I do these days, that we are each finding some sense of "normalcy" in our daily lives.



Looking back on it now, I am so proud of how our industry rose to the occasion when it mattered most. That we remained true to our values of caring for families with compassion and kindness and supporting them during their time of need. We found creative ways to adapt our services, and still provide that "personal touch." And in doing we also discovered that:

- Families are now comfortable using technology to conduct business and coordinating life planning events
- The digital tools our industry integrated into daily operations during the pandemic - for marketing and recordkeeping and trust administration - will better serve our profession for the foreseeable future.

I have said it before and I will say it again, it is truly an honor to support you and your businesses so that you have more time to focus on what's important: serving your families and communities.

Sincerely,

Bill Williams
President and CEO, Funeral Services, Inc.



TECH SPOTLIGHT

eCommerce

Maximizing the revenue and profit potential of a preneed program remains one of the top priorities for the deathcare industry. As the recognized pioneer and leader in trust administration and record keeping, FSI's eServices platform provides funeral directors and cemeterians with unmatched tools to manage preneed programs easier and more efficiently.

With our proprietary, user-friendly technology, you can:

- Sell preneed directly on your website
- Create and edit compliant, electronic contracts from your desktop, laptops or tablet
- Provide easy-to-process payment options for your families
- View every detail of your trust account and contracts, 24/7
- Have access to the fastest disbursement turnaround times in the industry

To learn more about how you can leverage our eServices technology to grow your business - and help minimize staff time spent on data collection and entry and eliminate the chances of informational or mathematical errors - contact ClientServices@FSITrust.com.

REGULATORY UPDATE FROM WRW LEGAL

Selling Preneed to a Person Holding a Power of Attorney

You may occasionally be presented with a Power of Attorney form during the preneed contracting process. Many of our clients are unsure about how to properly consider the person holding the Power of Attorney.

Before clearing the matter up, let me define the parties to the Power of Attorney. There is the "giver" of the power, that is the person who signs some powers over to another person. And, there is the "holder" of the power, that is the person who receives the powers from the giver. The Power of Attorney form, itself, will limit the powers given and held. Florida law defines, with specificity, what is necessary to make a Power of Attorney form legal. So, when presented with a Power of Attorney, you should reach out to your lawyer to make sure that it is, indeed, valid.

The holder of a valid Power of Attorney can, *if the Power of Attorney form allows*, sign for the giver. That means that the holder can execute a preneed contract AS the giver. The holder can also execute other deathcare related authorizations, such as a cremation or embalming authorization. The holder should, when acting under the authority of the Power of Attorney, sign his or her name and beside write "as POA for [name of giver]". Those documents may be treated as though they were signed by the giver himself or herself.

Where so many licensees go wrong is in acknowledging a Power of Attorney but then having the holder sign AS the holder, rather than AS the giver. This is especially problematic when the giver is an applicant for public assistance and the preneed contract must identify that the Purchaser is the beneficiary of or applicant for public assistance.

Takeaway: When presented with a Power of Attorney form, pay special attention to how the holder of the Power of Attorney executes the preneed contract. Always have the holder sign "as POA for" the giver.

FSI IN THE NEWS

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:

Paul White Outlines Single-Pay Preneed Strategies in Southern Funeral Director



It's no longer a question of if inflation will continue to increase, but how much, which means funeral businesses will need to aggressively manage expenses while looking for ways to boost revenue. Fortunately, we have a strategy you can implement to navigate inflation through single-pay preneed. [Read more here.](#)

Paul White Highlights Pandemic "Lessons Learned" in Catholic Cemetery

The pandemic has taught deathcare professionals several lessons on how embracing technology can better help serve families in need. In a recent issue of Catholic Cemetery Magazine, FSI's Senior Vice President of Client Development and Marketing, Paul White, focuses on three ways that an increased digital approach can support the assistance Catholic cemeteries are providing to their communities. [Read more about Paul's insights here.](#)

Bill Williams Discusses Technology & Job Satisfaction in The Director

Today's new technology can help state associations improve their Frontline and back-office employees are the heart and soul of every successful funeral home or cemetery, but do they have the necessary digital tools to provide first-class service to your families? FSI President & CEO Bill Williams highlights three ways to enhance employee job satisfaction and company culture through effective trust and sales program administration and technology. [Learn more here.](#)

FSI DEPARTMENT SPOTLIGHT:

CLIENT DEVELOPMENT & MARKETING

FSI is organized into several departments staffed by experienced professionals who work each day to provide you with excellent service. Each department plays a crucial role in powering your trust and sales programs. To help you get to know the FSI team collectively, we shine a spotlight on one department each quarter.



Paul White



Tommy Settles

Our Client Services and Marketing team includes industry veteran **Paul White**, LFD, Senior Vice President and **Tommy Settles**, LFD, Client Services Manager, professionals with extensive experience in funeral home technology and preneed marketing. You can rely on FSI to:

- Help you learn the in's and out's of e-contracts and how to process business in the most efficient way through FSI's services
- Keep you up to date with new laws and regulations that may impact your marketing and operations

Look for our Client Services and Marketing team at the FCCFA Convention, the CANA Convention and the NFDA Convention.

IMPORTANT FSI DATES TO REMEMBER

Independence Day

*FSI offices will be closed
in observance of
Independence Day*

FCCFA Convention

*Hyatt Regency Coconut
Point Resort & Spa,
Bonita Springs*

**104th Annual Cremation
Innovation Convention
(CANA)**

*OMNI Atlanta Hotel at CNN
Center, Atlanta, GA*

Labor Day

*FSI offices will be closed in
observance of Labor Day*

**NFDA Convention
Baltimore, Maryland
Visit Us at Booth #2914!**

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