

Funeral Service Alliance of WI.  
PO Box 67  
Madison, WI 53701



### **FSCA Annual Fall Conference At a Glance**

19 Hours of Funeral Director Continuing Education Credits  
8 Hours of Insurance and Funeral Director Credits

5 CEUs in Category 1  
10.5 CEUs in Category 2  
9 CEUs in Category 3  
2.5 CEUs in Category 4

#### **FSCA Fall 2012 Conference**

<b>Where?</b>	Hyatt on Main 333 Main St. Green Bay, WI 54301 (920)432-1234 <a href="http://www.greenbay.hyatt.com">www.greenbay.hyatt.com</a>
<b>When?</b>	November 7 & 8, 2012
<b>What's Included?</b>	Full Registration for both days includes: Continental breakfasts, lunches, vendor reception and all sessions.

FSCA 2012 Fall Conference  
November 7 - 8, Hyatt on Main, Green Bay, WI

## Guest Speakers

### **Bruce Bratton - Brown Wilbert, Inc.**

Bruce Bratton has been valuing and acquiring funeral homes in the United States since 1982. Bruce has conducted over 350 funeral home valuations, and has acquired over 50 funeral homes in Minnesota, North Dakota, Iowa and Wisconsin.

Subsequently, Bruce has grown his own private funeral home consulting practice through his own company, IQbrew, LLC, in conducting funeral home valuations and funeral home business management consulting for privately-held funeral home owners across the United States.

Bruce is also the President of Brown-Wilbert, Inc., one of the largest Wilbert-brand manufacturers and distributors of burial vaults in the United States, operating eighteen manufacturing/distribution plants in four states—Minnesota, North Dakota, South Dakota and Wisconsin.

### **Mark McCool - Brown Wilbert, Inc.**

Mark McCool began serving funeral directors and their families in 1979 and after 13 years, transitioned from Vice President of Suhor Industries Wilbert Vault operations in Missouri to Wisconsin in a dedicated Marketing role with Chandler (now Brown) Wilbert Vault companies.

### **David Gavin - Brown Wilbert, Inc.**

David Gavin has over 32 years of experience in the funeral industry. Thirty of those years have been with Brown-Wilbert, Inc. as a Sales and Marketing Representative.

Mr. Gavin serves as a dedicated source of training for Brown- Wilbert, Inc., which includes the development of new product programs as well as the expansion of current educational offerings.

### **Nancy McMillan**

Nancy F. McMillan, CLU, ChFC, REBC is a Continuing Education Provider for Wisconsin and Florida. Currently, she has 18 courses approved.

Her seminars are diverse and include topics such as Healthcare Directives, Ethics, Understanding Medicare and Strategies for Retirement. In addition, she develops continuing education courses to meet an organization's specific interests or needs. McMillan also facilitates educational seminars for the general public.

### **Daniel McNeff - Legally Mine**

Mr. McNeff is the C.E.O. of Legally Mine. In addition to running his own businesses for the last 20 years he has served as The Senior Vice President of one of the Nations largest financial services company for 15 years. He is a published author with one book and many magazine and newspaper articles. He has been married for 31 years is the father of 8 children and grandfather to 9 so far.

Mr. McNeff has conducted hundreds of seminars and is responsible for helping thousands of people protect their assets, and reduce their tax liabilities.

### **John Kiesow - WI. Dept. of Health Services**

John Kiesow, Wisconsin's State Registrar, started his career with the State working in the State Legislature while attending college. He left state government to work in the private sector for approximately 9 years.

He returned to the legislature in the early 1980's, working for two Legislators in the Assembly. In 1985 he took a position in the Senate as chief of staff for a State Senator where his key assignment was working with the Joint Finance Committee on issues affecting the state budget. He especially enjoyed his position, when his boss became co-chairman of the finance committee.

In 1995 he moved to the Department of Health and Family Services as the Executive Assistant to the Secretary until he accepted the job of State Registrar in late 2002.

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## FSCA Fall Conference Agenda - Wed., Nov. 7th

<b>7:30 AM - 8:00 AM</b>	Registration & Continental Breakfast
<b>8:00 AM - 10:00 AM</b>	<b><u>Update on Wisconsin Funeral Trust</u></b> Invited speakers from the state of Wisconsin, as well as national industry leaders will be presenting on the status of the Wisconsin Funeral Trust and the implications this could have on the funeral industry in Wisconsin. Open question and answer session will follow presentations. (2 CEUs - Category 2)
<b>10:00 AM - 12:00 PM</b>	Vendor Exhibits & Displays (2 CEU - Category 3)
<b>12:00 PM - 1:00 PM</b>	Lunch & FSCA Executive Update (1 CEU - Category 2)
<b>1:00 PM - 3:00 PM</b>	<b><u>Value &amp; Viability: Adaptation in a Changing Funeral Market</u></b> Owning your own funeral home used to be the way to secure a great income and comfortable retirement. But new forms of competition and end of life choices, including cremation, have cut income and contributed to falling funeral home values. Bratton shows how to restore financial health and wealth your funeral business. (2 CEUs - Category 3)
<b>3:00 PM - 5:00 PM</b>	<b><u>Legislative Update with Open Roundtable Discussion</u></b> The FSCA will be providing a report on the 2012 election results and a preview of the 2013-2014 legislative session, specifically discussing the combo legislation and its potential effects on funeral service in Wisconsin. As always, this update will include a roundtable discussion, allowing those present to openly discuss issues relating to the funeral profession. (2 CEUs - Category 2)
<b>5:00 PM - 7:00 PM</b>	Vendor Reception & Social Networking (2 CEUs - Category 3)

## FSCA Conference Agenda - Thurs., Nov. 8th

**7:30 AM** - Registration / Continental Breakfast

### **Track I** **Insurance & Funeral Director CEUs**

**8:00 AM - 10:00 AM - How to Maximize an IRA**  
Trillions of dollars are being transferred via an inheritance from an IRA. Most people who retire roll their company sponsored retirement plan into an IRA. This seminar explains how beneficiaries can maximize the inheritance by choosing a distribution option that minimizes the amount lost to taxes and provides an income for life. The program also explains how the options differ for non-spouse beneficiaries versus spousal beneficiaries. (2 CEUs - Category 3)

**10:00 AM - 12:00 PM - How to Avoid Retirement Scams**  
This seminar identifies the primary target of retirement scams and explains why this group is the most vulnerable to this type of fraud. The program also explains the most popular retirement scams and identifies the characteristics that indicate fraud. Information is also provided on how to avoid becoming a victim to a retirement scam. (2 CEUs - Cat. 1)

**1:00 PM - 2:00 PM - WI's Newest Healthcare Directive**  
Wisconsin has had a new healthcare directive, Five Wishes, since May 1, 2007. It is now the legal healthcare directive in 42 states. However, most Wisconsin residents are totally unaware that this new option is available. This seminar explains how Five Wishes is a more comprehensive healthcare directive than a living will or a power of attorney for healthcare. The program also includes ideas on using Five Wishes as a marketing tool to increase awareness of the services your funeral home provides. (1 CEU - Category 3)

**2:00 PM - 5:00 PM - The Principles of Ethics**  
This seminar emphasizes the importance of ethics in the funeral profession. The program addresses issues such as ethics and market conduct, regulation of the insurance industry, and the relationship between ethics and compliance. The material also specifically explains the authority of an insurance agent, how it is created and the responsibilities that an agent has as a fiduciary. Other topics covered include working with other professionals and an explanation of the various codes of ethics developed by professional groups within the insurance industry. (3 CEUs - Category 2)

### **Track II** **Funeral Director CEUs**

**8:00 AM - 10:00 AM - Understanding Legal Tools**  
Financial and or professional success in your career unfortunately makes you a candidate for attack from a trial attorney and his or her clients. No attorney will file a lawsuit unless he or she thinks that there is money or assets to be obtained through the suit. This course will teach you how to own and control your assets in such a way that only you have access to them. These tools will lock out the trial attorney and in the process eliminate the threat of lawsuits. (2 CEUs - Category 2)

**10:00 AM - 12:00 PM - Funeral Home Hygiene and Hazmat Remediation - Approved for your annual OSHA training!**  
OSHA compliance workshop featuring excerpts from the video, "Prep Room Survivor" by Mark Arnold - OSHA Consultant. Sponsored by Brown Wilbert, Inc. (2 CEUs - Category 4)

**1:00 PM - 1:30 PM - WI Update on Electronic Death Certificates**  
A representative from the WI. Department of Health Services will be on hand to discuss the new electronic death certificate reporting, features of the system and differences between the paper and electronic version. (0.5 CEUs - Cat. 4)

**1:30 PM - 3:00 PM - Embracing the 'Indoctrinated' Funeral Consumer**  
A rapidly increasing number of first-time funeral families have stronger opinions based on pre-conceived notions of the funeral professional, funeral 'customs', and means of disposition based on influences outside the family. This course examines these outside forces, their effect on funeral family decision makers, and strategies for funeral professionals to sometimes untangle and reshape the message to the benefit of these consumers. (1 CEU - Cat. 1, 0.5 CEU - Cat. 2)

**3:00 PM - 5:00 PM - The Informed Consumer: The Dynamics of Dialogue**  
Now more than ever it is important to have an informed dialogue with your consumers to ensure all needs are met and all matters are understood. This seminar helps to identify ways communication is best presented to the consumer. (2 CEUs - Category 1)

# FSCA 2012 FALL CONFERENCE REGISTRATION

## 2012 Registration Fees

**\*\*Deadline for Registration to the Conference is Friday, November 2, 2012.\*\***

### Member Fees

Type	Price	Type	Price
◆ Funeral Director Credits Only	\$75	◆ Insurance Credits Only	\$50
◆ Both Funeral Director & Insurance Credits	\$125		

### Non-Member Fees

Type	Price	Type	Price
◆ Funeral Director Credits Only	\$100	◆ Insurance Credits Only	\$75
◆ Both Funeral Director & Insurance Credits	\$175		

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Attendee: \_\_\_\_\_  FD Credits  Insurance Credits  Both

Attendee: \_\_\_\_\_  FD Credits  Insurance Credits  Both

Attendee: \_\_\_\_\_  FD Credits  Insurance Credits  Both

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Total # of Funeral Director Credits Only: \_\_\_\_\_ Total # of Insurance Credits Only: \_\_\_\_\_

Total # Both Funeral Director & Insurance Credits: \_\_\_\_\_

**TOTAL PAID:** \_\_\_\_\_

Please send your registration form and check made out to FSCA to:

**FSCA  
PO Box 67  
Madison, WI 53701**

*For a special room rate of \$129 per night, please contact the Hyatt on Main in Green Bay at: (920)432-1234 and mention that you are with the Funeral Service & Cremation Alliance to receive that rate. Room block will be released on October 24, so make your reservations before the release to guarantee that rate.*

**Hyatt on Main  
333 Main St.  
Green Bay, WI 54301**