

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



FSCA Annual Fall Conference At a Glance

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

3 CEUs in Category 1
10 CEUs in Category 2
7 CEUs in Category 3
2 CEUs in Category 4

FSCA Fall 2013 Conference

Where?	Krause Funeral Home 21600 W. Capitol Dr. Brookfield, WI 53072 (262)432-8300 www.krausefuneralhome.com
When?	October 29 & 30, 2013
What's Included?	Full Registration for both days includes: Continental breakfasts, lunches, vendor reception and all sessions.

FSCA 2013 Fall Conference
October 29 - 30, 2013 - Brookfield, WI

Guest Speakers

Doug Gober

Doug Gober began his funeral service career thirty-four years ago as a sales representative in the casket industry. He has earned numerous national awards from various organizations within the death care industry. Doug also served as a consultant on various marketing and merchandising projects conducted on an international scale.

In October 2011, Doug joined Live Oak Bank based in Wilmington, North Carolina. Live Oak Bank lends money to small businesses in select industries, one of which is death care management. As a result of his extensive experience in funeral service, accounting and finance, Doug serves as an industry liaison and Senior Loan Officer, connecting those in death care management with the opportunity of financing.

A native of Birmingham, Alabama, Doug graduated from the University of Alabama in 1977, where he earned a Business Degree in Accounting. Subsequently, he became a Certified Public Accountant specializing in industrial audits and corporate tax-

es.

Ernie Heffner

Ernie Heffner, CFuE, is president of Heffner Funeral Chapels & Crematory in York, Pennsylvania. He is a 1974 graduate of Pittsburgh Institute of Mortuary Science [PIMS] where he lectures annually. A second-generation funeral director, Heffner owns and operates a crematory and 12 funeral homes, eleven in Pennsylvania and one in New York. His background includes a monument company and two memorial park cemeteries previously owned and operated.

In 2003, Heffner was the founding dean of the ICCFA University College of Cremation Services and, in 2008, the founding dean of the College of 21st Century Services and has served as Chancellor of the ICCFA University since 2011. Heffner previously served the ICCFA as a vice president, board member and Annual Convention co-chair.

He is a past president of the Pennsylvania Cemetery Cremation & Funeral Association, has been a member of that organization's board of directors for many years and has chaired a number of its annual conventions.

Hayden Burrus

Hayden Burrus is the President of HB Actuarial Services out of Florida, and is the founder and principal actuary of a casualty actuarial consulting practice. In this capacity, he serves as an expert witness for actuarial issues, including opinion relating to the determination of actuarially sound insurance rates filed with the state insurance department.

Previous to that, Hayden served as a chief actuary for Amcomp Insurance Company and has spoken at the IC-CFA's conferences relating to cemetery's perpetual care funds and the viability of those funds.

G. Kent Mangelson - American Society for Asset Protection

G. Kent "GK" Mangelson is an expert in the area of lawsuit protection and tax reduction strategies. He has authored and co-authored several publications and training manuals on the subject including *The Advanced Tax and Asset Protection Training Manual* and *The Asset Protection Bible*. As one of the nation's top asset protection advisors he has spent over 30 years helping professionals properly structure themselves for lawsuit protection, tax reduction, and estate planning. Mr. Mangelson is a nationally recognized speaker who has trained thousands of professionals at hundreds of conventions, conferences and seminars across the country.

Rhonda Noordyk - Global View Capitol

Rhonda Noordyk is an Executive Director and Chair of the Women's Division at Global View Capital Advisors. She is in business with her husband, Tim. Together, they have over 15 years of experience in the financial industry.

Rhonda graduated with honors from Carroll University with a Bachelor of Science in Communications. She is passionate about empowering women to believe that financial independence is possible by designing and implementing national and international educational workshops and seminars. When she is not working, Rhonda enjoys fitness, reading, boating and spending time with ambitious, fun people. Rhonda and Tim reside in Oconomowoc, Wisconsin with their three daughters: Jenna (7), Karissa (5) and Ella (3).

FSCA Fall Conference Agenda - Tues., Oct. 29th

9:00 AM - 10:00 AM	Registration, Continental Breakfast & Exhibitor Set-Up
10:00 AM - 12:00 PM	<u>No State Law Supercedes the Constitution</u> (2 CEU - Category 2) Ernie Heffner is one of more than 30 plaintiffs in a Federal Case known as Heffner v. Murphy in which the PA State Board of Funeral Directors and the long standing PA State FD Laws were alleged to be in violation of the Constitution of the United States of America. Who were the parties that filed the suit? Who lined up to help defend the defendants? What were the 12 specific areas of the law being challenged? Where was the action filed and where does the ruling apply? How did they begin the process? Why did they elect litigation over a legislative solution? What is the current status of this matter? Heffner will address these points and answer questions.
12:00 PM - 1:00 PM	Lunch & FSCA Executive Update
1:00 PM - 3:00 PM	<u>Size Does Matter - Why Growing Your Business is Key to Your Future</u> (2 Hours - Category 3) Every indicator points to a time of tremendous opportunity in funeral service in the next few years. Demographically, economically, and experientially, there are huge opportunities to grow your business – and, of course, the challenges that go with them. In reality, smaller businesses can seize that advantage, as well. They're more nimble and can embrace growth strategies just like the big guys – if they're willing to invest in their futures. In this presentation, Gober will look at three distinct growth opportunities that exist, along with the financial and operational strategies small firms need to level the playing field.
3:00 PM - 4:00 PM	Vendor Exhibits & Displays (1 CEU - Category 3)
4:00 PM - 5:00 PM	<u>Legislative Update with Open Discussion</u> (1 CEU - Category 2) Receive an update as to what is happening in Wisconsin as it relates to the 2013-2014 legislative session. Open discussion to include the latest regarding the combo law and the pressure from the cemeterians and SCI to change this law.

FSCA Conference Agenda - Wed., Oct. 30th

7:30 AM - Registration / Continental Breakfast

Track I Insurance & Funeral Director CEUs

8:00 AM - 12:00 PM - Long Term Care Partnership Training
Long term care partnership training provides instruction on Wisconsin's LTC Insurance Partnership program and includes information on Wisconsin's Medicaid program. The training explains the relationship between the two programs and how one affects the other. In addition, the seminar emphasizes the importance for agents to have comprehensive understanding of the interaction of the two programs when selling Wisconsin's LTCIP policies. (4 CEUs - Category 2)

12:00 PM - 1:00 PM - Lunch

1:00 PM - 5:00 PM - Annuity Suitability Training
This course describes the types of annuity contracts, parties to an annuity contract, annuity contract provisions and the primary uses of annuities. The training also includes appropriate sales practices, replacement and disclosure requirements and discussion of the special issues for sales to senior consumers. (2 CEUs - Category 1 / 2 CEUs - Category 3)

Track II Funeral Director CEUs

8:00 AM - 9:00 AM - A Paradigm Shift - Marketing to Women
Rhonda Noordyk with Global View Capitol will discuss the latest paradigm shift in the twenty-first century - marketing to women. This program will explore how women's roles in decision making has changed. Learn to effectively communicate when marketing to women and what affects their decision making and purchase choices. (1 CEU - Category 1)

9:00 AM - 10:00 AM - Update on WI.'s Mortuary School
Mike Cornelius with Wisconsin's MATC Mortuary Program will be presenting on the current status of the mortuary school in Wisconsin and the changes that have been made to the program in recent years. (1 CEU - Category 2)

10:00 AM - 11:00 AM - Vendor Exhibits & Displays (1 CEU - Cat. 3)
11:00 AM - 12:00 PM - Perpetual Care Fund Adequacy - How Much is Enough?
This session will provide an overview of how to ensure the solvency of a perpetual care fund and the reality of many of these funds in cemeteries throughout the country. (1 CEU - Category 3)

1:00 PM - 3:00 PM - Protect Your Business From Lawsuits and Shelter Your Assets
This course teaches proven and effective strategies to achieving financial peace of mind by learning how to properly structure your assets so you become invincible to lawsuits, save thousands in taxes and eliminate your estate taxes. (2 CEUs - Category 2)

3:00 PM - 5:00 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. (2 CEUs - Category 4)