



 A FIDUCIAL COMPANY®

MONDAY, MAY 15, 2017

### Open House

1:30 to 3:30

*Jacksonville Office*

9418 Waypoint Place  
Jacksonville, FL 32257

### Welcome Reception

5:00 to 7:00

*at Sheraton Jacksonville* )  
*Buchman Rooms 2 & 3*

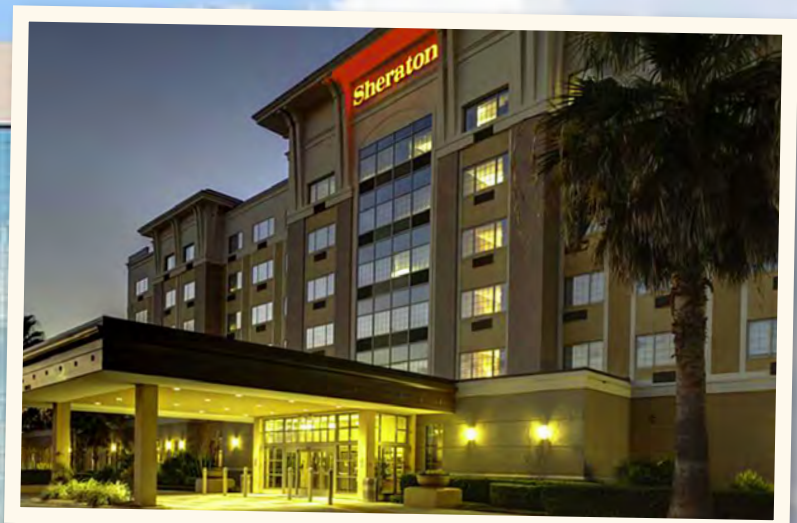
TUESDAY, MAY 16, 2017

**Cash Flow Invitational**  
*Continuing Education Program*

**Sheraton Jacksonville**  
*Buchman Ballroom*

10605 Deerwood Park Blvd.  
Jacksonville, FL 32256

# JACKSONVILLE REGIONAL MEETING



FEDERATED  
FUNERAL BUSINESS EXPERTS PROVIDING  
BOOKKEEPING, TAX & CONSULTING SERVICES SINCE 1925



AGENDA  
REGIONAL MEETING  
MAY 15 & 16, 2017

8:15 – 9:00 **Registration & Continental Breakfast**

9:00 – 9:15 **Opening Remarks**

**Bill Armour** • *Field Consultant, Federated Funeral Directors of America*

9:15 – 10:10 **How to Drive Leads on Social Media,  
It's Not Just 'Good Will' Marketing**



**Ryan Thogmartin** • *CEO, DISRUPT Media Co.*

**Course Overview:** This session will look at how to use social media effectively to drive leads and help your families understand the value of memorialization.

**Speaker Bio:** Ryan is a death care entrepreneur and an experienced marketing professional. He is the Founder and CEO of DISRUPT Media Co. which is a full service

social media management and content agency dedicated to the funeral profession. He is the Creator of [ConnectingDirectors.com](http://ConnectingDirectors.com) and Host of #DISRUPTu! and #FUNERALnationtv.

10:10 - 10:20 **Break**

10:20 – 11:10 **Simple Strategies to Increase Your Bottom Line**



**Jamie Meredith** • *Executive Vice President, C&J Financial, LLC*

**Course Overview:** This session is designed to focus the business owner on the payment methods they offer and the impact that those methods have on their business, the client and ultimately the amount of revenue generated per sale.

**Speaker Bio:** Jamie is the Executive Vice President of C&J Financial and its affiliates; American Funeral Financial, Funeral Funding Center and Morticians Choice. The FAST FUNDING® Group, as they are referred to, is part of the Security National family of companies and is the largest provider of insurance assignment funding in the nation. The FAST FUNDING® Group processes in excess of 40,000 funeral assignments and funds more than \$250 million dollars annually to 2000+ funeral homes across America. He has worked in the funeral and insurance business for nearly 20 years.

11:10 – 12:00 **Taking Control of Your Accounts Receivables**



**Curt Dailey, ACE** • *Manager of Accounts Receivable Services,  
Federated Funeral Directors of America*

**Course Overview:** This session is a discussion of plans to increase cash flow using a Payment Policy and to reduce aged accounts. Payment policy options and implementation will be discussed. The necessity for obtaining good information during arrangement and instituting a routine follow-up plan to collect accounts not paid at arrangement.

**Speaker Bio:** Curt is the Manager of Accounts Receivable Services for Federated Funeral Directors of America. He holds a Bachelor's degree in Business Administration with concentrations in Marketing and Operations Management. He is a member of the American Collector's Association and has the professional designation of Associate Credit Executive from the Society of Certified Credit Executives.

12:00 - 12:30 **Lunch**



AGENDA  
REGIONAL MEETING  
MAY 15 & 16, 2017

12:30 - 1:20 **Employee Theft Prevention and Detection**



**Dave Snyder** • *Field Consultant,  
Federated Funeral Directors of America*

**Course Overview:** Implementation of the internal accounting controls necessary to deter and detect fraud, theft and waste.

**Speaker Bio:** Dave Snyder is an accountant that had the privilege of growing up on the second floor of the family funeral home. His career began in 1988 at a regional public accounting firm which led to a consulting career with Federated in 1997. Assisting independently owned funeral homes in the development, implementation and management of cash flow improvement strategies is his passion.

1:20 - 2:10 **“What’s Your Business Worth”**



**Shannen Mayfield, CPA/ABV** • *Director Business  
Relations, Federated Funeral Directors of America*

**Course Overview:** This session is a focused discussion of the valuation process and what the results of the valuation report mean to the business owner. Current trends in funeral home values and transaction prices and structure will be discussed. Key factors which impact the business’s value and strategies to improve the business value will be addressed.

**Speaker Bio:** Shannen currently serves as the Director of Business Relations for Federated Funeral Directors of America, a Fiducial Company and is responsible for the Accounting, Tax, Valuation & Transaction Services, and Compliance functions of the operation. She holds a Master’s of Accountancy degree and a Bachelor’s in Finance. She is credentialed by the AICPA as an ABV – Accredited in Business Valuation.

2:10-2:20 **Break**

2:20 - 3:10 **Funeral Industry Access to Capital –  
The Challenges, the Process, the Solutions**



**Tim Bridgers** • *General Manager-Funeral Home Lending  
Live Oak Bank*

**Course Overview:** This session is a focused discussion on the importance of adequate cash flow to any funeral home business for successful growth and sustainability, and the different financing opportunities in the market place to assist in this effort. Topics will be covered that include day-to-day challenges small business owners face, common terms used when working with lenders, and real-life examples of how access to capital improves the funeral home owner’s available cash flow.

**Speaker Bio:** Tim Bridgers joined Live Oak Bank in 2014 with over ten years of valuable business and entrepreneurial experience. He studied Mechanical Engineering at the University of North Carolina at Charlotte, Business at the University of North Carolina at Wilmington, and completed his Finance degree at Liberty University. This diverse education prepared Bridgers for success in sales, marketing, and management. He is dedicated to assisting small business owners in the Funeral industry become and remain successful with Live Oak Bank’s products and services.