SELECTED CONNECTIONS PROGRAM DETAILS

Program # SCP-2013-1 **Registration Fee:** $375

Completed Enrollment Application form and check must be received at Selected Independent Funeral Homes Headquarters **by OCTOBER 25, 2013** in order to be considered for the program.

Host Firm: Heritage Family Funeral Services, Inc. **Phone:** 423-512-111
Contact Person: Richard Tetrick **Fax:** 423-543-3533
Address: Program to be held in Atlanta, GA **E-mail:** richard@heritagefamily.com
Within driving distance to the
Tom M. Wages Funeral Home
Snellville, GA

Program Dates: **November 3-5, 2013**

Hotel: **Hampton Inn**
1135 Lakes Parkway
Lawerenceville, GA 30043

Hotel check-in is 3:00p.m. Check out time is Noon.

Reservations: **1-770-338-9600**
Once registered for the program, participants should contact the hotel directly to make reservations. Please indicate you are with *Selected Independent Funeral Homes Selected Connection*. A limited number of rooms have been set aside for the program, so participants are encouraged to make room reservations as soon as possible to hold your spot!
Room rate is $92.00 /person/night.
Participants are responsible for all hotel expenses.

Arrival date is Sunday, November 3, 2013.
All participants should plan to meet in the hotel lobby at 4:00 p.m. on Sunday, November 3 for a tour of the Tom M. Wages Funeral Home in Snellville, GA. Dinner will be provided at a local restaurant following the tour. Transportation also will be provided for the evening.

Departure date is Tuesday, November 5, 2013.
Program is scheduled to conclude at 2 p.m.

Transportation: **Recommended Airport:** Atlanta, GA (ATL)
Approx. Distance to Host Firm: 36 miles

Participants are responsible for getting to/from Atlanta.

Once in Atlanta, Mr. Tetrick will be providing transportation from the airport to the hotel. Please contact him to coordinate pick-up. In addition, transportation will be provided from the hotel to all related functions (funeral home tours and group meals). When the meeting concludes on Tuesday, transportation will be provided from the hotel back to the airport.

Meals: Group meals will be provided by Mr. Tetrick the evenings of November 3 and 4 as well as lunch on November 4 and 5. The Hampton Inn offers a free hot breakfast.

Attire: Business Casual

Presenters:
Richard Tetrick, CEO/President, Heritage Family Funeral Services, Inc.
Tyler Tetrick, President, Heritage Family Cemetery
Alan Creedy, CPA and Consultant
Michael Soper, Legacy Funeral Group
Phil Schmitz, Pioneer Enterprises
Rick Baldwin, Former owner of Baldwin-Fairchild Funeral Home
Brooks Cowles, Johnson Consulting

Program Topic 1: **What Should You Know about Growing Your Business through Acquisition?**

Program Topic 2: **What Are Some Options for Structuring the Purchase of a New Funeral Home?**

Program Topic 3: **What Are Some Options for Financing the Purchase of a New Funeral Home?**

Throughout the course of the program, participants will learn that growing a business through acquisition is the fastest way to do it and can be very successful. However, there are many tax implications to purchasing an existing funeral home. Presenters will share ways firms might consider structuring the purchase of funeral homes to take advantage of potential tax savings. In addition, financing the purchase of an acquired funeral home does not have to be that challenging. There are several methods to finance an acquisition, including bank financing, financing by an insurance company or owner financing. Presenters will share their experiences with the various ways they've used to finance their acquisitions through the years.

Agenda Day 1 Sunday, November 3, 2013

Participants should meet in the hotel lobby at 4:00 p.m. for a tour of the Tom M. Wages Funeral Home in Snellville, GA. Dinner will be provided at a local restaurant following the tour. Transportation will be provided for the evening.

Agenda Day 2 Monday, November 4, 2013 7:30 a.m. – 4:45 p.m.

Breakfast on your own. The Hampton Inn offers a free hot breakfast.
Participants should meet in the hotel lobby at 7:30 a.m. for transportation to the meeting.

8:45 a.m. Welcome by Richard Tetrick

9:15 a.m. Alan Creedy

10:45 a.m. Tyler Tetrick

Lunch

1:30 p.m. Michael Soper

3:15 p.m. Phil Schmitz

Adjourn

Participants will be given information on where/when to meet for the evening's group dinner.

Agenda Day 3 Tuesday, November 5, 2013 7:30 a.m. – 2 p.m.

Breakfast on your own. The Hampton Inn offers a free hot breakfast.
Participants should meet in the hotel lobby at 7:30 a.m. for transportation to the meeting.

8:45 a.m. Rick Baldwin

10:30 a.m. Brooks Cowles

The morning sessions conclude with a panel discussion.

Lunch

Adjourn at 2 p.m.