

*A Guide to
Planning Seminars*

**A Great Pre Need
Lead Source!**

**By
Nancy Lohman**





Educational Seminars

The following package should provide everything you may need to plan a seminar

- 1. Outline of what our seminars are all about:**
 - a. Overview, Format, Content of Seminar (Page 1)**
 - b. Responsibilities: What we Provide, What the Facility provides, and the benefits to someone's association**
- 2. Seminar Worksheet**
 - a. This worksheet is to be completed by Sales Counselor and given to the pre need administrator so that she can ensure the speaker is available and scheduled.**
- 3. Sample Flyer-These may be customized for your educational seminar**
- 4. Sample Ad for Publications and/or Newspapers - These may be customized for your educational seminar**
- 5. Sample Description of our seminars...this was created to help a counselor know what to say to a possible seminar location host**
- 6. Sample Newsletter "blurb"-This was designed in case a certain assn. or neighborhood has a newsletter that allows them to provide a "write up" of our seminar with (or without) a flyer or ad.**

- 7. Sample RSVP/Sign up Form to use at your seminar. This should be used along with the “ballots” we use that gathers information and are used to draw for the door prize.**
- 8. Sample Letter to an Assn. or Community requesting a seminar. Although Phone calls and personal visits are best, this letter can be sent to help encourage a seminar.**
- 9. “Are My Affairs in Order” Test and answers- This is a great tool to use at the beginning of a seminar to break the ice and get people involved.**



This handout may be used to assist you and/or your counselors when they approach organizations regarding the possibility of arranging an Educational Seminar

Overview

Opportunity and reason for residents and family members to get together

Opportunity for exposure and community awareness

Opportunity for everyone to benefit

Format

Lunch and Learn Educational Seminar

Non-threatening Environment – Free of Charge

No Selling Conducted

Content my include

The Value of a Funeral and/or Committal Ceremony

Why Cemeteries and/or Funeral Homes Encourage Pre Planning

Funeral, Burial and Cremation Facts

Funeral, Burial and Cremation Logistics

Consumer Rights and Protection

Funeral and Burial Customs and Traditions

Veteran's Benefits

Educational Seminars
Presented by Nancy Lohman of Lohman Family Properties

Responsibilities

Lohman Family Properties:

Advertising and Promotion

Speaker

Presentation Materials

Door Prizes

Guest Log (Sign in Sheet)

Refreshments

Your Facility

Meeting Room with Power Outlets

Tables, Chairs

A place for us to serve refreshments for attendees

Benefits to the Organization or Association

Gain timely and important information

Foundation for “Educated” Decisions

Interesting and Unusual Topic

Good Public Relations Experience



Seminar Worksheet

To be completed in preparation for each seminar scheduled

WHAT: Seminar Description: _____

WHEN: _____ AMPM
(Day, date) (Time)

WHERE: Name of Place: _____
Address: _____

WHO: _____ -Presenter
_____ -Counselor
_____ -Counselor

WHAT TO BRING: (By Counselor)
Refreshments (ie Punch, Cookies, Fruit & Cheese, etc.)
Screen
Brochures
One EPG with Sample written on it
Sign Up Sheet
Bowl and Ballots for Drawing
Door Prize
Laptop (Nancy will bring)
Projector (Nancy will bring)

"Are Your Affairs in Order?"

Complimentary Lunch
And a Special Presentation

By Nancy Lohman

"Everything you need to know to pre-arrange & prepare for life's most important transition, and the incredible financial and emotional benefits of pre-planning"

Tuesday, MARCH 3rd

11:30 ~ 1:00 pm

Seminar will be held at:

The Riviera Assisted Living Facility

123 Ridgewood Ave., Holly Hill

PLUS...For each Guest
a **FREE GIFT** ~ a magnetic, vinyl
Life-Saving "File of Life" for your Home

RSVP to Beth

226.1100

Sponsored by
LOHMAN
FUNERAL HOMES
CEMETERIES & CREMATION

Are Your Affairs in Order?

Free Continental Breakfast and Seminar

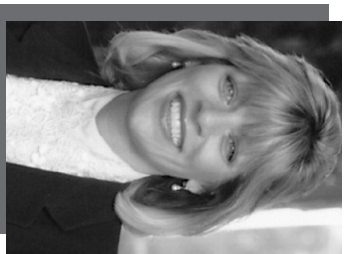
Tuesday, September 26, 9:30–11:30 A.M.
1 Yacht Club Drive, Palm Coast



Mike Chiumento
Attorney At Law
Elder Care Attorney

Member: Florida Bar

- Elder Law
- Wills
- Trusts
- Probate
- Real Estate



Nancy Lohman
Co-Owner/General Manager
Lohman Funeral Homes

Member:

- Independent Funeral Director of Florida
- Licensed Pre-Need Specialist
- Lohman Family is 3rd generation, with over 50 years experience



Ed Pruitt, CFP
Investment Representative

Guest Speaker

Ed Pruitt
Edward Jones

- Advanced Directives
- Durable Powers of Attorney
- Avoiding Probate

- Burial/Cremation Choices & Alternatives
- Pre-Need Arrangement/Key Advice
- Florida Laws—Your Rights & Protection

- Dedicated to helping you reach your long-term, financial goals
- Part of your estate-planning team
- Free financial review

Reservations Required
RSVP—(386)-439-0047

CHIUMENTO
& ASSOCIATES
ATTORNEYS AT LAW P.A.

LOHMAN
FUNERAL HOME
PALM COAST

Free Gift
Refreshments

Seminar Description to share with Possible Seminar Locations

Thank you for considering our presentations for an educational program for your Association. We have two presentations. The first is entitled, “Are Your Affairs in Order?” and the second is entitled “How to Plan Your Celebration of Life”.

They are both informative and educational seminars with a touch of humor. Included in our first presentation are such things “What you need to know, What you want to know, & What you should know about funeral and cremation arrangements” and in the second presentation the focus is on First-the Key Decisions, Second-“The Experience” ...Creating Memorable Moments & Life’s Keepsakes, Third-The Value of Memorialization and then lastly, Where do you go from here.

Either of these and their respective descriptions are fine with us, simply let us know which one is most appropriate.

We look forward to seeing you on the _____. We have also attached our logo if you are able to please use it in your newsletters.

Thank you again for the opportunity!

Date.....

For a Community Newsletter:

Please join us on _____day, _____ at
_____a/pm in the _____ for a
special presentation entitled, “Are Your Affairs in Order?”
Nancy Lohman, will be presenting this informative and
educational seminar with a touch of humor. Included in her
presentation are such things as important state regulations,
key advice regarding advance directives, today’s trends,
choices and alternatives, and more. For more information
and to RSVP, Call 673-1100.

Date

Ms. _____
_____ Home Owners Assn.

Dear _____;

Thank you for speaking to me last week. Recently, we have been asked to give several educational seminars throughout the area on choices and alternatives regarding funeral, burial and cremation services. These seminars seem so popular that we thought it would interest you as a topic for one of your monthly meetings. Could you please pass along this information to your activities director and allow me to follow up directly with her later this week?

We have been a presenter at _____, _____, and _____ to name a few. At each seminar, we customize our talk around the number of people in attendance and the subjects and interest of the attendees. We furnish our own overhead projector and screen and give to all attendees a complimentary "Personal Planning Guide". Please call _____ if you need a reference. We gave a 15 -20 minute presentation and remained at their breakfast for an additional hour simply answering questions to a captivated audience. There is no selling during our visit; it is strictly educational.

If a seminar like this would interest you and your community, please do not hesitate to call me at (386) 673-1100. I will also call you directly to follow up. I look forward to meeting you.

Sincerely;

Pre Need Specialist



~ Are My Affairs in Order? ~
Grading Scale

50 points ~

Excellent

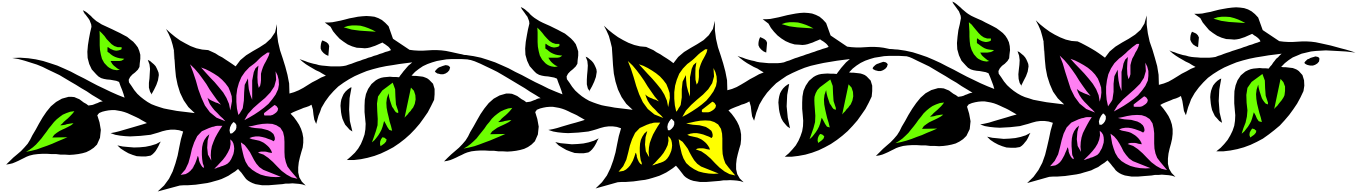
You're well prepared and you will be leaving your family a "gift of love".

35-49 points ~

OK ~ But need to talk

1-34 points ~

Not so good ~ Would afternoon or evening be better?



~ Are My Affairs in Order? ~

Ask yourself these questions:

- 1. Have I made pre plans (pre arrangements) with a funeral home?*
 No (1 pt)
 Yes (5 pts)
- 2. Is there one person in this world (at least) who clearly knows if something happened to me tonight, they would be in charge of my final arrangements tomorrow?*
 No (1 pt)
 Not Sure (3 pts)
 Yes (5 pts)
- 3. If something happened to me tonight, do I know (am I sure) who legal "next of kin" is?*
 No (1 pt)
 Not Sure (3 pts)
 Yes (5 pts)
- 4. Do I know that my legal next of kin can decide whether I am cremated, buried or entombed (despite [not knowing] my wishes) if I have not made my pre arrangements?*
 No (1 pt)
 Not Sure (3 pts)
 Yes (5 pts)
- 5. Have I discussed my final arrangements with my family? Do they have a clear idea of my wishes?*
 No (1 pt)
 Not Sure (3 pts)
 Yes (5 pts)

6. *If something happened to me tonight, is my next of kin prepared financially to pay for my funeral and/or cremation arrangements in full within the next 24-48 hours?* **No** (1 pt) **Not Sure** (3 pts) **Yes** (5 pts)
7. *If something happened to me tonight, is my next of kin aware that they would need to pay for my funeral and/or cremation arrangements in the next 24-48 hours?* **No** (1 pt) **Not Sure** (3 pts) **Yes** (5 pts)
8. *Am I aware that a funeral service and/or cremation service with some of celebration of my life would cost between \$2,000 and \$10,000?* **No** (1 pt) **Not Sure** (3 pts) **Yes** (5 pts)
9. *I would hope that my family and/or friends would host some type of funeral service and/or celebration of my life in the next week if something were to happen to me tonight.* **No** (1 pt) **Not Sure** (3 pts) **Yes** (5 pts)
10. *There are some meaningful and poignant contributions and/or achievements, as well as some special qualities I have, that I hope will be remembered, through funeral services, a celebration of my life and also in my newspaper tribute.* **No** (1 pt) **Not Sure** (3 pts) **Yes** (5 pts)

Total Points:

_____ **No** _____ **Not Sure** _____ **Yes**