

Welcome to our January newsletter where we share news and views. We know that for many funeral directors, the winter months can be particularly busy but that said, we hope you were able to find some time to relax and enjoy the festive season. From all of us at Ecclesiastical Planning Services, thank you for your continued support - we look forward to another year working together.

**Happy
New
Year!**

Ensure your arranging forms and satisfaction surveys are working for you

Some of your biggest advocates are families for whom you have carried out a funeral in the past. These families will understand the difficulties that can arise when people don't make funeral plans and are therefore more likely to plan ahead themselves.

Many families are not aware that they can arrange a pre-paid funeral plan via their local funeral director.



This is why our training support is designed to ensure that your team is confident in introducing pre-need in a sensitive way and at the right time.

Simply following up after a funeral with a phone call or by sending an information pack can be very effective in maximising pre-need opportunities. But before you can do this, or invite customers to memorial events, you must obtain their permission to market to them under the General Data Protection Regulation (GDPR). We can help to make this process straightforward with a guide to ensuring your arranging forms are working for you. In addition, we can provide a GDPR compliant post-funeral questionnaire, to help ensure you capture the correct permissions. To request copies, please speak to your Relationship Manager or email marketing@epsfunerals.com.



Get the best value from your leaflets with our scheduled campaigns

When it comes to preparing your marketing activity, like most things in life, planning ahead can save you money. Our bulk leaflet campaigns, which take place each spring and autumn, continue to be effective in raising awareness of at-need business and promoting the benefits of pre-paid funeral plans. More than 20 funeral directors are taking part in our upcoming bulk spring campaign, bringing the price of distribution and print down for the benefit of all firms involved.

We provide bespoke campaign plans and personalised leaflet designs for the firms we support, so that all you need to do is agree your budget, offer, select your target postcode sectors and approve your leaflet design.

Autumn may seem like a long way off, but it's not too early to start thinking about taking part in our next campaign. Speak to your Relationship Manager and register your interest today to ensure you don't miss out.

Remember to provide a breakdown of costs – help us to help you

Please include a full breakdown of costs on all funeral plan application forms and send the top copy of the application to us, if you use a triplicate form. We would be grateful if you could let your relevant colleagues and additional branches (if applicable) know, so that we can continue to process plan applications and administer death claims without delay.



Top three proven ways to effectively promote your funeral plans



1 Staff training

Ensure your team has a good working knowledge of funeral plans and can introduce them in the right way with confidence and compassion.



2 Effective processes

Ensure all pre-need enquiries are followed-up consistently and professionally. Regularly review your processes with your team and make changes if needed.



3 Door drop campaigns

An excellent way to boost enquiry levels and raise awareness of your pre-need offering is via a localised, incentivised leaflet campaign.

For help, advice and support with any of the above, please contact your Relationship Manager or call our head office on 0800 633 5626.

Thank you for your positive feedback – we're committed to doing even more for you in 2020

We are delighted to share the results of our annual funeral director opinion survey, which has revealed that 96% of supporting firms consider us to be the most trusted provider of funeral plans. In addition, 94% of funeral directors say they are either very or extremely satisfied with the service provided by Ecclesiastical Planning Services.

While we are pleased with this response and recognition of the team's hard work, we are committed to doing even more to offer unbeatable services to supporting funeral directors in 2020, while staying true to our ethics of transparency and honesty. These values are more relevant than ever as we move into a new era of funeral planning.

Satisfaction of overall service

94%

of funeral directors are **extremely or very satisfied**

98% in total are satisfied



96%

of funeral directors consider us to be the

most trusted provider of funeral plans



84%

rate our **claims payments** as better than others



80%

rate the **security of our pre-payment fund** as being better than other funeral plan providers



77%

say our overall **pre-payment proposition is better** than that of other plan providers



87%

rate our **speed of service** as above average or market leading



Supporting communities with Ecclesiastical charity days

As part of Ecclesiastical's commitment to ensuring the business makes a positive contribution to the community in which it operates, all employees are given the opportunity to complete one day of volunteer work for a charity of their choice per year. Here are some examples of the charity work we completed in 2019.



1 New Start Cat Rescue - Claire Chamberlain, Fay Smart, Michelle Firth, Georgia Fairley, Emma Smith, Lorraine Townley and Jennifer Trigg

Colleagues from the Marketing and Client Services Teams provided a helping hand for the New Start Cat Rescue in Huntley, which rescues and finds homes for abandoned and unwanted cats. The charity only has one full-time member of staff and relies on the support of volunteers to carry out its exceptional work. The team fed the rescue cats, cleaned their pens, and even helped with 'cat-cuddling', which helps to prepare the animals for rehoming. In the afternoon, the team also helped to upcycle some furniture.

2 The Royal British Legion - Pauline Cooper and Brenda Kehoe

Relationship Managers Pauline and Brenda spent their volunteering day with the Royal British Legion's local Hardwicke & District branch. Having set up shop in Tesco, Pauline and Brenda got to work selling poppies to help raise money for serving and ex-serving members of the Armed Forces community and their families. Brenda often gives her time to raise money for the Royal British Legion - a charity close to her heart, her partner having served in the military for many years.

The Salvation Army Christmas Appeal - Chris Clark and Loretta Sadler

For the second year in a row, Managing Director Chris and Client Services Administrator Loretta chose to support the Salvation Army's Christmas Appeal. The worldwide Christian charity is dedicated to fighting social inequality. Chris and Loretta worked at the Gloucester-based church, preparing and serving Christmas lunches for vulnerable and homeless people. As part of the Salvation Army's foodbank scheme, Loretta also helped to prepare food parcels to be distributed to disadvantaged families in the area.

3 The National Trust - Rhonda Hall, Penny Mustoe and Sarah Turner

Client Services Administrators Rhonda, Penny and Sarah chose to spend their charity day volunteering with the National Trust-owned Woodchester Park in Stonehouse. The team was tasked with digging holes through Cotswold stone to fit one of five new benches, for which the National Trust had received funding. Once the team had finished, their bench was neatly positioned to give generations of visitors a spectacular view of the Victorian gothic mansion for years to come.

4 Red Horse Foundation - Emma Simpson

Marketing Manager Emma Simpson spent a day volunteering at the local Red Horse Foundation. Through working with horses, the charity provides therapy sessions that can help to improve mental health and mindfulness. Emma said: "It was amazing to both witness and find out more about the difference the therapy sessions make. I look forward to further supporting this charity in the future."

5 CCP Hamper Scamper Event - Lynn Denby

At the Regency Shopping Arcade in Cheltenham, Lynn from the Marketing Team helped busy shoppers to tackle their Christmas wrapping in exchange for a donation to Caring for Communities and People (CCP).

In addition, the Ecclesiastical Planning Services team's annual 'bonus ball' scheme generated £87 in leftover prize money which, in support of CCP's Hamper Scamper event, was used to buy Christmas presents for disadvantaged children. The event seeks to spread festive joy through giving food parcels and presents to families who may be living on the brink of homelessness and struggling to afford food and heating.

Introducing the NEW Regular Payment Funeral Plan – low cost monthly payment option based on your plans and your prices

We are delighted to introduce our new Regular Payment Funeral Plan; a monthly payment option which allows customers to pre-arrange their funeral with you and spread the cost over a longer term.

While a proportion of customers already choose to pay by instalments, feedback from funeral directors shows that there is rising demand for a more affordable payment option. We are confident that the new Regular Payment Funeral Plan fulfils this need, offering the following benefits:

- Competitive monthly payments
- No requirement to pay a management fee with the first payment
- Fixed monthly payments that can be made over more than 5 years

- The customer can take up to two payment holidays over the life of the plan
- The full plan value is paid out on death after the first year

Like our traditional funeral plans, the Regular Payment Funeral Plan is supported by a high quality whole of life assurance model – we have taken the time to ensure that it provides exceptional value for both funeral directors and customers. In addition, funeral director's fees and disbursements fees are guaranteed to grow by 4% per annum.

Managing Director, Chris Clark, said: "Offering customers and supporting funeral directors flexibility is a priority for us and this is just another way we are working to enhance our proposition for the firms we support. We have already seen much interest since launch."

Our Regular Payment Funeral Plan is available now. Speak to your usual Relationship Manager today to find out more.

Terms and conditions apply – please ask for details.



12 Days of Giving – Ecclesiastical gives £120,000 to various charities throughout December

Following previous successes, the Ecclesiastical Group relaunched its 12 Days of Giving campaign over the festive season, giving a total of £120,000 to 120 nominated charities over 12 December days. The campaign is part of the Group's Movement for Good initiative, which aims to improve the lives of people around the UK by supporting charities in a number of sectors. By choosing Ecclesiastical Planning Services to support your pre-need business, you are directly contributing towards this exceptional cause and making a real difference to people's lives.

If you'd like to be kept informed about Ecclesiastical's corporate giving, please visit www.ecclesiastical.com/12days and complete the form.



Any questions? Contact
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For more information on any of the topics covered this month, please contact your Relationship Manager.

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