
Editable price guide – instructions for funeral directors

FOR APPOINTED REPRESENTATIVES ONLY.

Plan and contact details

1. Type the plan name directly into cell B1
2. Type your business name directly into cell D2
3. Type your business address or location directly into cell D3
4. Type your business telephone number directly into cell D4
5. Type your business email address directly into cell G4

Plan type

Specify whether the plan includes guaranteed disbursements:

- If the plan **does include** guaranteed disbursements, select 'Yes' from the dropdown in cell N3
- If the plan **does not include** guaranteed disbursements, select 'No' from the dropdown in cell N3

This will change the wording in row 23 and hide the wording in row 45 (if "Yes" selected). Check this looks correct before proceeding.

Plan inclusions

1. From rows 12-35, choose which services should be listed by selecting either 'Yes' or 'No' in the corresponding cell of column L. Please note, rows 9-11 and 14-15 are locked and as key features, they must be included in all plans.
2. If included in the plan, rows 10, 13, 14, 15, 17, 18, 27 and 34 require further information. Complete column O by typing the quantity directly into the corresponding cell. Complete column R by clicking into each cell and selecting from the available options.

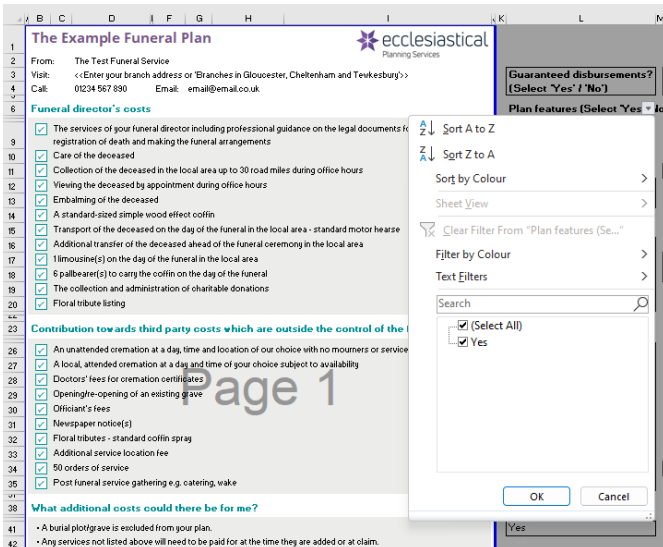
Row 14 requires another two pieces of additional information (coffin side and lid options). Complete columns U and X by clicking into each cell and selecting from the available options.

Refer back to the main printable area to check the plan inclusions look correct before proceeding.

3. Choose either an unattended cremation, an attended cremation, or opening/re-opening a grave from rows 26, 27 and 29. Please note, if selecting an attended cremation or opening/re-opening

a grave, officiant's fees (row 30) must also be included. Please also select 'Yes' for row 41 if you select 'Opening/re-opening of an existing grave', 'A burial plot/grave is excluded from your plan.'

- Use the filter on cell L6 to filter out and hide any services not included in the plan. To do this, click the arrow icon and ensure only the 'Yes' option is selected as shown below. Click 'OK'. Check that the remaining visible rows look correct.



The screenshot shows a spreadsheet titled 'The Example Funeral Plan' with columns A through M. A filter dropdown menu is open over cell L6, displaying options for sorting and filtering. The search box within the dropdown contains the text 'Yes' and 'Select All'. The spreadsheet content includes sections for 'Funeral director's costs', 'Contribution towards third party costs which are outside the control of the funeral director', and 'What additional costs could there be for me?'. The 'Funeral director's costs' section lists various services with checkboxes, and the 'Contribution towards third party costs' section lists additional costs with checkboxes. The 'What additional costs could there be for me?' section includes a note about burial plot/grave exclusion.

Plan price

- Enter the funeral director's costs directly into cell O51 in line with the pricing parameters.
- Enter the third party costs directly into cell O52.
- Specify whether the plan includes any extra charges, separate to the administration fee (these must be approved by Ecclesiastical Planning Services before being applied):
 - If the plan **does include** extra charges, select 'Yes' from the dropdown in cell N57
 - If the plan **does not include** extra charges, select 'No' from the dropdown in cell N57
- Check that everything looks correct before 'saving as' and printing.

Creating a PDF

To create a PDF that can be emailed to customers, simply 'save as' PDF.

Updating your price guide(s) in the future

To update the price guide in the future, please ensure you always access the latest version via our website, as this template will include any regulatory updates.

Please speak to your Business Relationship Manager if you have any questions.