



**ALL WORKING TO HELP  
MAKE YOU MORE PROFITABLE**





# HELPING FUNERAL HOMES SINCE 1925

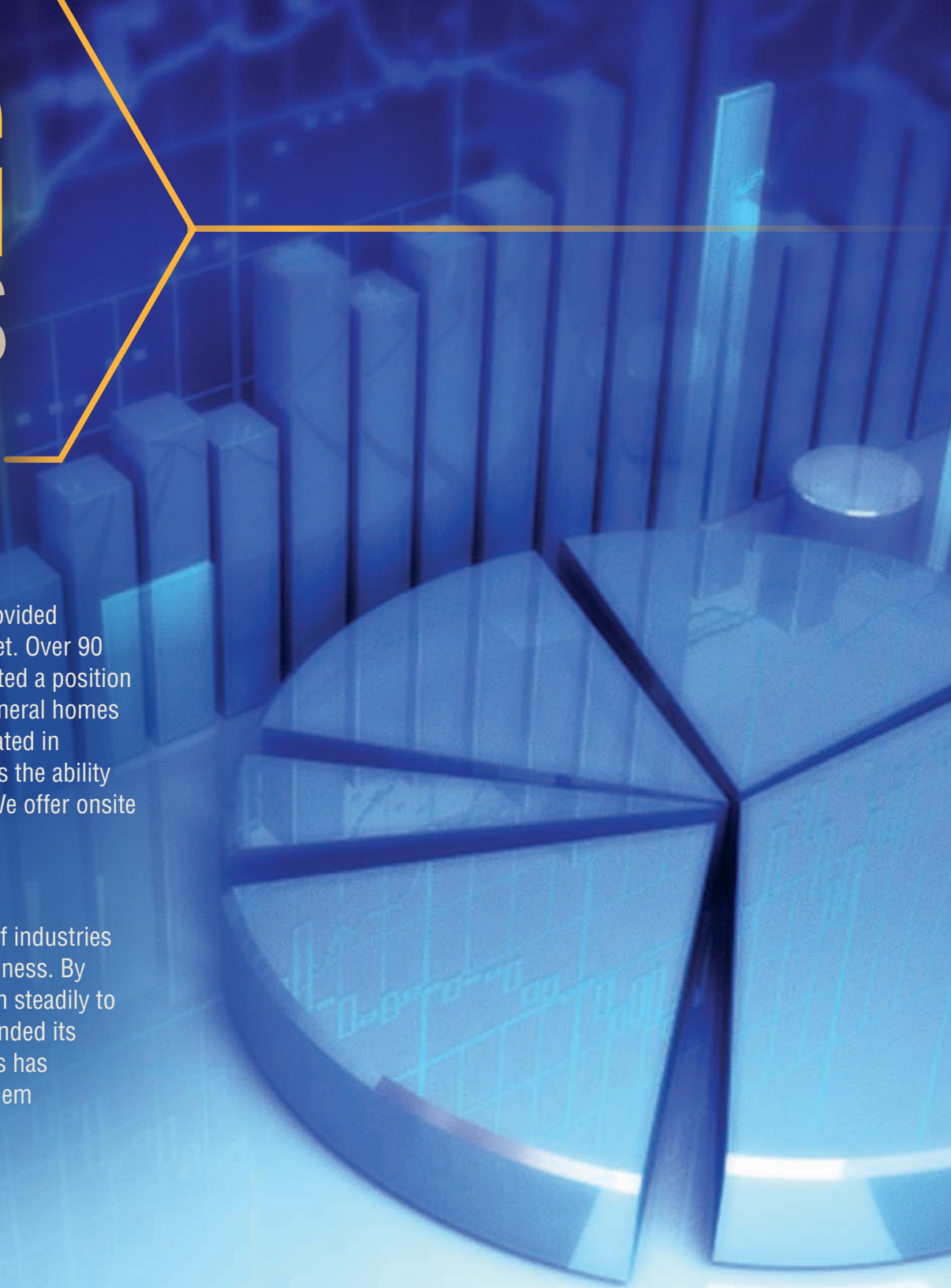
## **About Federated**

Since 1925, Federated Funeral Directors of America has provided business services to those specializing in the Funeral market. Over 90 years of experience and over 1,400 members afford Federated a position unmatched in the field. We are able to provide service to funeral homes and cemeteries across the 50 states. Our main office is located in Springfield, Illinois. Through our technology we offer clients the ability to electronically transfer their business data to our office. We offer onsite support through our Field Consultants.

## **About Fiducial**

Fiducial has been providing business services to a variety of industries since 1970 and is still owned and managed as a family business. By bringing added value to our clients, the company has grown steadily to become the largest accounting firm in France and has expanded its presence in the United States in 1999. The company's focus has always been working with small business owners to help them grow and be profitable.

Contact us at [www.federated-funeral.com](http://www.federated-funeral.com)





# VALUATION & TRANSACTION SERVICES

**How do you know how much your funeral home is worth?  
What are the tax implications of selling your business?**

Tax Analysis helps sellers understand their complete sales picture.

Business valuations are a powerful tool in assessing the strengths and weaknesses of your business and how they affect your business value.

Understand your future plans and develop a succession plan that helps you accomplish these goals. Business valuations prepared by Federated follow AICPA's statements on Standards for valuation Services and meet the SBA requirements as a qualified source of business valuations for lenders. Our professional staff is CPA/ABV credentialed.





# PAYROLL

**Experience and expertise to provide a cost effective payroll processing system**

- Tracking your payroll schedule
- Collection and processing payroll data with detailed reports
- Processing payroll checks and direct deposits
- Processing third party payments
- Payment of taxes to appropriate agencies
- Federal and State tax filing
- Compliance with employment regulations





# RETIREMENT PLAN ADMINISTRATION

**Offering Retirement Plans, Medical Reimbursement Plans  
and Employee Handbooks**

We are Third-Party Administrators offering a variety of services, including, but not limited to, reporting and tax returns for your Retirement and Medical Reimbursement Plans.

Let us recommend the right plan for you through an in depth analysis of your business, ensuring you are receiving significant tax advantages and incentives available. You and your employees can invest now for financial security at retirement.





# ACCOUNTS RECEIVABLE MANAGEMENT

**A positive & timely approach to collection that puts you in charge.**

Helping you with a proven, reliable system to collect your money

- Developing a Payment Policy
- Estate Claim Filing
- Truth-In-Lending
- FTC Funeral Rule
- Bankruptcy Claims
- Assignments and releases
- ACH Payment Processing
- Periodic Reminder Forms to the Funeral Home
- Crowdfunding with Giving Compassion

**Services include:** Initial memoranda, Monthly Billing Statements, Collection follow-up, attorney & agency referral





# FEDERATED

## THE COMPLETE SOLUTION.

- Timely Financial Information
- Tax Experts
- Bookkeeping systems
- Tax Planning
- Onsite Consultation
- Collection Solutions
- Pensions
- Payroll
- Valuation & Succession Planning
- Innovative Tools

**Bringing it all together under one roof to help you  
maximize your business**









# TECHNOLOGY

## EASY ACCESS, FASTER PROCESSING

Since 1925, Federated has been paving the way for funeral directors to manage their businesses.

- Business Tools and solutions for your business success
- Member Portal with your financial picture at your fingertips
- Secure file communication and access

[www.federated-funeral.com](http://www.federated-funeral.com)



**FEDERATED FIDUCIAL**

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

Why Choose Federated? About Us Our Team of Experts Our Services Employment

Accounting & Tax Valuation & Transaction Services Business Consulting Retirement Plan Administration Payroll A/R & Collection Services Crowdfunding Services

**ACCOUNTING & TAX Services**


Accounting is usually a time-consuming and often frustrating chore that distracts you and your staff from focusing on your customers and your services; Federated can lift that burden.

**Our Team of Professionals includes:**

**Our Tax Manager:** Dawn Kivrengei, CPA - over 30 years' experience in public accounting and auditing focusing on the small business sector. She holds a BA degree in accounting from Southern Illinois University in Carbondale, IL.

**Our Division Managers**  
Our Division Managers oversee the day-to-day bookkeeping and tax planning function for their clients. Each of our members is assigned to a division to enable us to provide quality, efficient and personalized service for their funeral home.

COME AND SEE US IN 2017 - ALL THE EVENTS



**FEDERATED FIDUCIAL**

**Client Performance DASHBOARD**

Data based upon last financials processed: August 2015

**Number of Calls**

For the Period: 122 Calls

Year to Date: 325 Calls

Prior Year to Date: 298 Calls

**Manager Tools**

- Dashboard
- Quickbooks
- 1099
- Supplies
- M2 Form
- Stats
- Portal Test



# BUSINESS CONSULTING & MANAGEMENT ANALYSIS



We have time-tested, proven systems to help you make more money. **Cash flow statements, cost analysis, preparing budgets, pricing, FTC Compliance....**

## Comprehensive Solutions

Stats Book with everything you need to know about the funeral business

- What do families spend on cremation and burials?
- What does it cost to perform a funeral?
- What does a funeral home of my volume spend on personnel? On advertising?
- How should I be pricing my cremations or my service charge to make a profit?

Annual Service Plan and local Consulting presence to help you follow a budget for profit tool, set goals and be more successful

Enhanced Family Survey tool with direct feedback from your families

**Federated knows numbers.**





# TAX PLANNING

## ARE YOU GETTING THE RIGHT TAX PLANNING ADVICE?

**Tax Planning is not a once a year matter. Our year-round and continuous tax advice offers our members assistance in:**

- ❶ Reducing tax liability
- ❷ Proactive decision making
- ❸ Increasing cash flow

### **Be more profitable**

We do tax planning with every member. With the 75,000 page tax code how do you know what will work for you? Federated gives you the liberty to operate your own business with the power of big business.

We are Funeral Home tax experts. We only work with funeral homes and we work with you throughout the year to maximize expenses in order to lower your tax liability.

We are profit specialists! Federated's systems help you improve your bottom line. Our staff has over 2000 years of combined funeral service and business experience.





# GET THE RIGHT ADVICE

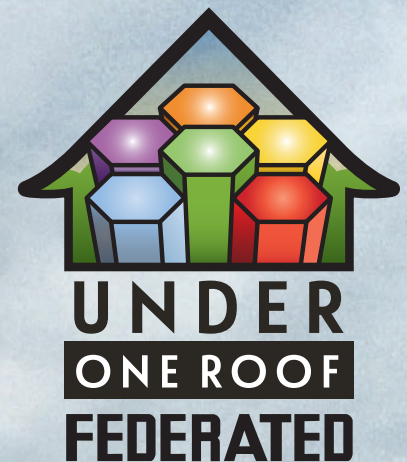
Since 1925, Federated has built a system to work with independent funeral home owners to provide timely financials and reports to help you make the best possible business decisions. We are a nationwide bookkeeping firm with years of experience and the expertise to help you be more profitable.

- **Technology:** Your financial picture at your fingertips
- **Timely Financial Reports:** Profit and loss statements, sales activity statements, Balance Sheets and Cash Flow Statements
- **Statistics:** Our nationwide database of funeral service organized by specific performance comparisons – our call volume and cremation rates
- Casket and vault sales
- Revenue and expenses organized by firms similar to yours
- Budgets and pricing suggestions based on similar sized operations
- Projections for the future income and expenses
- **Analytical Tools:** Annual funeral service plan, budget for profit, onsite consulting





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[www.federated-fiducial.com](http://www.federated-fiducial.com)

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