

Dear Licensing Authority,

At the request of one of your licensees, I am submitting our request for continuing education approval for the program, Marketing Embalming: The Ethical Promotion of Embalming Through Various Communication Channels presented by myself, on Saturday, October 14, 2017.

This program has been approved by the Academy of Professional Funeral Service Practice. I have attached the Application, Agenda, Approval Letter and my Curriculum Vitae.

If you require any further information, please do not hesitate to email me at robin@funeralfuturist.com or call me at 1-800-810-3595 or on my cell at 250-686-4576.

Thank you for your consideration and please let me know if you have any questions.

Sincerely,


A handwritten signature in black ink, appearing to read "Robin Heppell". The signature is fluid and cursive, with the first name "Robin" and last name "Heppell" clearly distinguishable.

Robin Heppell, BComm, CFSP

Funeral Home Education, Consulting, Marketing, & Web Development
Google AdWords Certified Partner
robin@funeralfuturist.com
800-810-3595 | 250-744-3595

Helping Funeral Homes serve more client families since 1998.

PROVIDER/SPONSOR CONTINUING EDUCATION REQUEST APPROVAL FORM

Program Provider/Sponsor: Robin Heppell, CFSP, of FuneralGurus.com Email: robin@funeralfuturist.com		Phone: 250-744-3595 Fax: 250-483-5455
Program Provider's Address: Box 8723		City/State/Zip: Victoria, BC, Canada, V8W 3S3
Program Title: Marketing Embalming		Number of CE Hours Requested: 3
Program Date(s): October 7, 2017 and ongoing		Program Locations: Live / Online
Program Description: See attached		
Method of Instruction: (check all that apply) <i>Self Study:</i> *audio *audio/video *exam *book/printed material <input type="checkbox"/> online (attach study materials and exam samples & procedures) <i>Classroom:</i> * lecture * panel discussion <input checked="" type="checkbox"/> video/teleconference * workshop (indicate # of hours for each section on outline)		Course Evaluation Method: <ul style="list-style-type: none"> ● Registration ● Attendance Monitoring ● Participation in Online Polls
Program Objectives: See attached.		
Program Facilitator/Instructor(s): Robin Heppell, CFSP		Faculty/Instructor Company, City, State, Phone #: FuneralGurus.com Victoria, BC 800-810-3595
Faculty/Instructor(s) Credentials: (brief summary and/or attach bio or vita for each, including education and teaching qualifications) See attached.		
Attendance is certified by: <input type="radio"/> Sponsor <input type="checkbox"/> Instructor <input type="checkbox"/> Other: <i>(sample certificate of attendance attached with certifier's name and address)</i>		
Describe method of attendance monitoring: Registration, Attendance Monitoring, Poll Participation		
This course is approved for C.E. credit by another licensing/professional organization? <input type="checkbox"/> No <input type="radio"/> Yes If yes, who? _____ (attach documentation)		
Will this program be open to all licensees? <input type="checkbox"/> Yes <input type="radio"/> No Fee Amount Charged: \$99.00 To register contact: Robin Heppell at: (250) 744-3595 / (800) 810-3595 or visit http://www.funeralgurus.com/		
<i>This form must be filed with the Board not less than sixty (60) days prior to the date of the program. Without adequate info., the Board cannot grant approval. Attach additional info. that would be helpful to the Board in determining approval. Any change in a program after approval is granted shall be approved by the Board. Failure to do so shall be grounds for revocation of approval.</i>		
I certify information contained in this form including the attached documentation is complete and correct.		
Name of _____ person completing the application: (Please Print) Robin Heppell, CFSP Address:(if _____ different from		
above) _____ City/State/Zip: _____ Victoria, BC _____ Date: 8 September, 2017 Signature: _____ Phone: _____ Fax: 250-483-5455		

For Board Use Only		State Board:	
Activity/Program #:	Provider #:	Checklist:	
On Agenda for:		Complete Application	
Approved for:	hours in category:	Instructor/s Credentials/Vita	
Disapproved – Reason:		Agenda/Outline	
		Measurement Criteria	
		Sample Certificate (if applicable)	
		Fee enclosed (if applicable)	
Signed:	Date:	Roster Received after Program	
(authorized board staff/reviewer)		Other:	

See next page for additional CE application info required by specific state boards with each application.

Additional Continuing Education Application Information Required by State Boards

Arizona: Indicate the number of hours and what part of program for EACH of the following categories :

- _____ A. Mortuary Science -
 _____ B. Legal Compliance/Ethics -
 3 C. Professional/Individual Development -

Arkansas: 30 day notice

Connecticut, Delaware, Maryland, New Mexico, Oklahoma, South Carolina: Activities approved by the Academy of Professional Funeral Service Practice will be granted credit by these states. Provide necessary documentation along with copy of approval letter from the Academy

Florida: Apply for CE on Florida's website. \$200 Annual Application Fee due June of each year

Georgia: \$250.00 Annual Application Fee due March of each year

Kansas: If approved, do you want this program to appear on our C.E. List? Yes No

Maine: Use Maine's CE request form.

Minnesota: Programs being held in different locations, but having identical curriculum and faculty, are considered one program. Programs that differ in either substance or faculty must apply as separate programs.

North Carolina: Use North Carolina's CE request form.

Ohio: Type or print one activity per application. Do not list 2 different activities/2 different months on the same application.
60 day notice required

- Check one: Application is submitted for Prior Approval (prior to activity) Individual Request
 Post Approval (submitted by individual licensee within (30) days after completion of an out-of-state activity)

Pennsylvania: 60 day notice required, \$100 fee per course, \$100 Annual application fee. No business. No Distance Learning. No Home Study. No need to reapply for repeat courses.

Tennessee: 60 day notice required, Requires 1 copy of this form form per course.

Texas: Indicate *what portion and the amount of hours* in your program pertains to ethics: **0 hours**

Use Texas CE request form. Texas Law Updates or Texas Vital Statistics? none
 \$50.00 fee per course/\$250.00 annual fee

Vermont: Continuing education topics shall be directly related to maintaining competence in essential issues of public protection and welfare. Use Vermont CE form and required outline form. Send 1 original and 4 copies of CE request. Continuing education shall be for whole hours only, with a minimum of fifty minutes constituting one hour. Contact hours may not include travel time, lunch or breaks. Approval will be granted for continuing education for a funeral director and/or embalmer. **60 day notice required**

West Virginia: It is the responsibility of the requesting organization to certify a licensee's attendance at an approved program. Board attendance forms must be used for attendance certification. *Indicate the number of hours and what part of program is considered for the OSHA/Health Education Category (all others will be considered General Education).* \$100 Application Fee due each year. **45 day notice required.**

Wisconsin: Describe under EACH subject category, those areas of the program which are educational for funeral directors. Itemize the number of educational hours for each part of the program. Automatic approval with Academy approval. **Failure to provide required info. will delay processing.**

- | | |
|---|---|
| 1. <u>Grief Psychology/Communications</u> | 3. <u>Business Management/Delivery of Services: 3 hours</u> |
| 2. <u>Professional Conduct/Ethics</u> | 4. <u>Technical/Sciences</u> |

National Approval Authority

Academy of Professional Funeral Service Practice: It is the responsibility of the requesting organization to certify a licensee's attendance at an approved program. **30 day notice requested**

For home study approval, include two (2) copies of each program or electronic copy and a one-time \$50 fee.

Providers are required to pay an annual fee of \$250 and submit programs for annual review.

If approved, do you want this program to appear on the APFSP CE list? Yes No

CONTINUING EDUCATION OBJECTIVES & OUTLINE

Robin Heppell: Marketing Embalming: The Ethical Promotion of Embalming Through Various Communication Channels (3 hours)

Description:

With cremation on a steady rise in North America, it is becoming harder to "Communicate the Value" embalming. Robin Heppell who has been speaking throughout North America over the last decade about trends, technology and marketing; and now tackles one of his toughest questions..."How can you ethically communicate the value of embalming when families may not even want a casket?" Stay tuned for his multi-pronged approach for families to say Yes to embalming.


Objective:

The objective of this training session is to emphasize the importance of having client families say YES to embalming and outline to implications for the family (and the profession) if they decline embalming. After completing this training session, the attendee will have a better understanding of importance of performing each embalming to achieve the best possible results and also to be better prepared when talking to the client family about the value and benefits embalming.

Agenda (Times noted are in Pacific Daylight Time)

8:00 am	to	9:25 am	Ethical Promotion of Embalming (Part 1)
9:25 am	to	9:40 am	Break
9:40 am	to	11:15 am	Ethical Promotion of Embalming (Part 2)

Program Facilitator/Instructor(s): Robin Heppell, CFSP	Faculty/Instructor(s) Company, City, State, Phone #: c/o Robin Heppell Box 8723, Victoria, BC, V8W 3S3 – (250) 744-3595
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<p>I certify and Name of Address:(if</p>  <p>5455</p>	<p>information contained in this form including the attached documentation is complete correct. person completing the application: (Please Print) Robin Heppell, CFSP different from above) City/State/Zip: _____ Date: September 8, 2017 Signature: _____ Phone: _____ Fax: 250-483-</p>
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September 15, 2017

SENT BY E-MAIL: robin@FuneralFuturist.com

Provider Number: 1067
Robin Heppell, CFSP
FuneralGurus.com
Box 8723
Victoria, BC V8W 3S3
Canada

Dear Rob:

The following is approval for continuing education from the Academy of Professional Funeral Service Practice. Evaluation of the material indicates eligibility for the following:

Course Title:	Marketing Embalming	Contact Hours:	3
Event Number:	17-7679	APFSP Category:	A
Event Date:	OPEN	APFSP CEUs:	0.3
Event Type:	eLearning		

Please include the Course Number (17-7679) and your Provider Number 1067 on all Certificates of Attendance or verification sheets or the following statement:

This course is approved by the Academy of Professional Funeral Service Practice, Inc., for 3 Contact Hours (APFSP Category A, 0.3 CEUs). Course Number 17-7679 is presented by FuneralGurus.com, Provider Number 1067.

We look forward to hearing from you in the future as you schedule continuing education programs. If you have any questions, please do not hesitate to call me at (770) 646-8988.

Sincerely,

Patty S. Hutcheson, CFSP
Executive Director

Robin Matthew Heppell, CFSP

Tel.: (250) 744-3595 - Fax: (250) 483-5455

Email: robin@funeralfuturist.com

Business Management and Consulting

- Owns and operates successful funeral planning and consulting company: FuneralFuturist.com
- Develops and improves effective business process solutions for funeral home operations
- Facilitated and managed multi-million dollar trust rollovers
- Consults for companies in marketing and promotion (both funeral and general business)
- Contributes thought-provoking articles for Mortuary Management & the Canadian Funeral News
- Presents 'In-Person' Continuing Education seminars for funeral directors in the areas of Business & Pricing Strategies, Preneed, Technologies, and Marketing throughout North America
- Holds Bachelor of Commerce Degree (Entrepreneurial Management), Royal Roads University
- Formerly instructed Business Management courses at the Canadian College of Funeral Service

Advance Funeral Planning Sales and Management

- Successful pre-need experience in both management and sales
- Rated in the Top 10 in sales in North America for NSM's Monumental Life Plan every year and no. 1 in 1997 despite having the lowest cost per funeral average of all participants (75% cremation)
- In-depth knowledge of current market pre-need products
- Performs analysis and audits of pre-need programs for various funeral homes
- Formerly supervised and trained funeral directors, sales reps and support staff in all areas of pre-need

Funeral Home and Business Marketing

- Operates FuneralFuturistWebsites.com (division of FuneralFuturist.com) that provides website development, support and training of funeral home websites
- Conducts monthly online marketing training sessions for funeral directors: FuneralFuturistU.com
- Familiar with all forms of marketing media: direct mail, print, radio, television, Internet, etc.
- Experience in column / article writing and press release submission
- Funeral Sector Member of the Funeral Profession Coalition Council of Canada
- Former Canadian component of NSM pre-need marketing group for 4 years
- Formerly held marketing position for McCall Bros. Funeral Directors Ltd. (www.mccallbros.com)

Funeral Directing and Embalming

- Over twenty years experience as a licensed funeral director and embalmer
- Extensive background in all facets of the funeral and cemetery industry
- Fourth generation funeral director

Funeral Home Software – Development, Implementation and Support

- Designed and developed a user-friendly at-need / pre-need database system. The system produces all documentation for at-need funerals, tracks and converts all pre-need files and provides extensive monthly and annual reporting
- Responsible for system installation and trouble-shooting, training funeral directors and clerical staff and Enhancing system based on end-user and government requirements
- Contracted by an independent funeral home for the purchase and implementation of this funeral home software. Duties included: program installation, trouble-shooting, and resulting modification; training funeral directors and clerical staff; and purchase, installation and set-up of 15 additional workstations, complete with networking, file sharing and security issues

Computer / Technology

- Intermediate to advanced skills in the following:
 - New Media Expert in Web 2.0 services including Facebook, Twitter, YouTube, Blogging & iTunes
 - Windows 98, 2000, XP, Windows 7 & Small Business Server 2003
 - MS Word, Access, Excel, PowerPoint, Outlook & Outlook Express
 - Google's Docs & Spreadsheets, Calendar, Alerts, Gmail, & Google Talk
 - Corel WordPerfect, Quattro Pro, Presentations, & Borland Paradox
 - Maximizer & ACT (Contact Management Systems)
 - Adobe's Photoshop, Premiere Elements, Flash Video
 - Blackberry (synchronization & efficiencies)

Robin Matthew Heppell, CFSP

Tel.: (250) 744-3595 - Fax: (250) 483-5455

Email: robin@funeralfuturist.com

Work Experience

Owner / Consultant	Heppell Media Corporation (Victoria, BC)	1998 – Present
Sales Representative	Aldor Solutions Corporation (Frisco, TX)	2002 – 2006
Funeral Director / Embalmer	McCall Bros. Funeral Directors Ltd., (Victoria, BC)	1986 – 1998
Funeral Assistant	Egan Funeral Home Ltd., (Bolton, ON)	1986

Education & Certification

Academy of Professional Funeral Service: Certified Funeral Service Practitioner 2006

PO Box 2275, Westerville, OH 43086-2275 · tel. 1-866-431-2377 · www.apfsp.com

- Successful candidates for certification in the Academy of Professional Funeral Service Practice may use the designation CFSP (Certified Funeral Service Practitioner)

Royal Roads University: Bachelor of Commerce (Entrepreneurial Management) 2002 – 2004

2005 Sooke Road, Victoria, BC V9B 5Y2 – tel. 250-391-2511 - www.royalroads.ca

- This is a two year on-line program which consists of: Business Communications, People At Work, Managerial Accounting & Control, Sustainable Development, Marketing, Entrepreneurial Expertise, Information & Technology Management, International Business, Finance & Investments, Organizational Change, Business Strategy, plus an Entrepreneurial Project
- Member of the four person Case Competition Team that represented Royal Roads at their International Case Competition in the Spring of 2004. This involved reading and analyzing a case study then creating a recommendation within a three hour time period, after which the recommendation was proposed to a simulated board of directors of the particular company

In-Sight Institute: Certified Celebrant 2003

PO Box 42467, Oklahoma City, OK 73123 - tel: 800-658-9262 - www.insightbooks.com

- A Celebrant is a person who has been trained and certified through the In-Sight Institute to meet the needs of families during their time of loss. They serve by providing a funeral service or tribute that is personalized to reflect the personality and lifestyle of the deceased.

CAIFA (Canadian Assoc. of Insurance & Financial Advisors): IFATC 101, 102, 103 1999 – 2000

41 Lesmill Road, North York, ON M3B 2T3 - tel. 800-563-5822 - www.caifa.com

- These courses are the necessary requirements to become a Level II Life Insurance Broker

Advanced Education & Training (B.C.): Funeral Directing & Embalming Apprenticeship 1987 – 1989

- Two year apprenticeship with two months of in class instruction and twenty-two months of correspondence courses and on-the-job training (at McCall Bros. Funeral Directors)

Leadership & Community Involvement

Confederation Lodge (Freemason): Member 1992 – Present

650 Fisgard Street, Victoria, BC V8W 1R6 - tel. 250-384-5724 - www.confederationlodge.com

- Held an office every year since joining (1992) and served as Worshipful Master (head of lodge) in 1997-98 & 2004-05
- Served two terms as President of Victoria Masters & Wardens Assoc. (representing 15 lodges) 1997-98, 2004 - present
- Served as District Education Officer 2000-01

St. Andrew's Presbyterian Church: Member 1993 - 2006

Courtney Street, Victoria, BC V8W 1C1 - tel. 250-384-5734 - www.standrews.pacificcoast.net

- Served as Elder (1997 - 2005) and Roll Clerk (2002 - 2005)
- Also served as Usher Co-ordinator and on a number of church committees

Hockey Coach Assistance 1988 - Present

- Help coaches with minor hockey goaltenders as well as adult players with disabilities