

OPTION 1: 100% PLANNING GROUP

- 1-2 seminars per year. Funeral home will have a representative at all seminars.
- Mailer is sent out to promote the seminar. Leads go to Planning Group P.O. box.
- Planning Group provides all digital and print marketing to promote the seminar.
- Planning Group does ALL follow up. Planning Group has dedicated days of the week to be at the funeral home for appointments for 2 weeks following the seminar.
- Walk-ins will be handled by the funeral home. Planning Group will assist in training the funeral home, setting up the policy via DocuSign, or mailing policy to the lead.
- Paper file stays at the funeral home.
- Planning Group pays for all mailings, food, and expenses associated with the seminar.
- Planning Group keeps all commission.

** Agent's travel expenses will be paid by Planning Group.

OPTION 2: FUNERAL HOME HAS LICENSE

- 1-2 seminars per year. Funeral home will have a representative at all seminars.
- Mailer is sent out to promote the seminar. Leads go to Planning Group P.O. box.
- Planning Group provides all digital and print marketing to promote the seminar.
- Mailer leads/seminar RSVPs come to Planning Group P.O. box.
- Planning Group does ALL follow up. Planning Group has dedicated days of the week to be at the funeral home for appointments for 2 weeks following the seminar.
- Walk-ins will be handled by the funeral home. Funeral Home and Planning Group split commissions on walk-ins.
- Paper file stays at the funeral home.
- Mailings, food, and expenses associated with the seminar will be shared with the funeral home.
- Funeral home and Planning Group share the commission.

** Agent's travel expenses will be split between the funeral home and Planning Group.

OPTION 3: FUNERAL HOME HAS LICENSE, SEMINAR HELP ONLY

- 1-2 seminars per year. Funeral home will have a representative at all seminars.
- Mailer is sent out to promote the seminar. Leads go to the funeral home.
- Planning Group provides all digital and print marketing to promote the seminar.
- Funeral home does all follow up.
- Funeral home pays Planning Group flat fee of \$4500 for organizing and presenting seminar.
- Funeral home pays for mailing costs and all other costs associated with the seminar.
- Funeral home keeps 90% commission from all seminar leads.

** Agent's travel expenses will be paid by the funeral home.

***If your funeral home is greater than 50 miles from the Planning Group offices, agent travel expenses may be incurred.*