

2013 AWARD RECIPIENTS
REGIONAL MANAGERS MEETING
CREMATION COMMITTEE MEETS
IT'S ALL ABOUT THE WHY

Legacy

Serving One Family at a Time

LEDGER

SUMMER ISSUE 2014

LEGACY
FUNERAL
GROUP



Our Growing Legacy Family 26 New Locations



Legacy closes with SCI on firms in Orlando, Florida; Jackson, Mississippi; and Mobile, Alabama



*Michael Soper
Legacy President
and CEO*

It's already summer. Where did winter and spring go? I hope you and your children/grandchildren are able to spend some time together while school is out!

We have been very busy with the purchase of several new properties. In the last couple of months, 26 new locations have been added to our Legacy family, bringing our total number of properties to 94 (funeral homes, cemeteries, and crematories).

Eighteen of our new funeral home locations were purchased from Paxus Services in Kansas and Oklahoma. The remaining acquisitions resulted from a Federal Trade Commission order instructing SCI to divest itself of properties after its purchase of Stewart Enterprises. These SCI

divestiture locations are in Orlando, Florida and Jackson, Mississippi. We have also signed an agreement to acquire a funeral home in Mobile, Alabama, pending FTC approval. Carey-Hand (Florida) was founded in 1885 and Wright & Ferguson (Mississippi) in 1923. We are very fortunate to have acquired these historic properties and look forward to carrying on the integrity and traditions of some of the most respected names in funeral service.

We are excited to welcome these new funeral homes and cemeteries to our Legacy family. In visiting the staff at these new locations, I have learned that they are committed to their funeral homes and they are excited to be a part of our strong culture. There is a re-born sense of ownership that is growing among these professionals as they begin to get more involved in their communities and in doing things the "Legacy Way." By all accounts, these new employees are looking forward to the fresh perspective

and new ideas that we have at Legacy. If you have the opportunity, please welcome the new members of our growing Legacy family!

In this edition of the Legacy Ledger, we recognize many of our employees from around the country that go above and beyond to make our families comfortable. At Legacy, we are continually trying to go from "Good to Great". Our management team and our cremation committee met and discussed how we are continually growing and striving to meet the needs of families at all of our locations. In this issue is an article by my good friend, Dr. Alan Wolfelt entitled, "It's All About the Why." Finally, we touch on a time for celebration as we reach out to the communities we serve through special programs.

Sincerely,

A handwritten signature in black ink, which appears to read "Michael Soper".

Legacy Funeral Group Presents 2013 Employee Awards



ERIKA BALTAZAR
Martinez Funeral Home & Crematory
2013 "Above & Beyond" Award



CINDY WALKER
Griffin Funeral Home
2013 Employee of the Year



SCOTT HAYNES
Baker Funeral Home
2013 Manager of the Year



LAURIE HOWARD
Rushing Estes Knowles Mortuary Inc.
2013 Manager of the Year



DAWN MATHIS
Resthaven Funeral Home
2013 "Above & Beyond" Award



SAMUEL MATJEKA
Davis Funeral Home Eastern
2013 "Above & Beyond" Award



LEA MINTON
Minton Chatwell Borger
2013 Family Service Counselor of the Year



DELINDA SCIFRES
Adams-Foster-Ray Funeral Home
2013 "Above & Beyond" Award



NATALIE CASTILLO
Trevino Funeral Home
2013 Funeral Director of the Year

Legacy Funeral Group Recognized as FDLIC's Top Funeral Home Ownership Group



Kris Seale, FDLIC President and CEO, presents Top Ownership Group award to Legacy Sales Director Brian Nichols

Funeral Directors Life Insurance Company (FDLIC), recently recognized Legacy Funeral Group as the Top Ownership Group for 2013. The award was given to the funeral home ownership group with the highest volume in preneed sales over the 2013 calendar year.

"I'd like to congratulate the entire team at Legacy on this outstanding achievement," said Kris Seale, FDLIC President and CEO. "It takes a great deal of vision and determination to accomplish these kinds of results day in and day out. Though Legacy is a growing company, amazingly, the funeral homes under the Legacy umbrella still have that small, mom and pop feel to them. This 'small

company feel' is a testament to Michael Soper's vision and leadership and the quality of people he has chosen to work with."

"We're very pleased and honored to be recognized with this award," said Legacy Sales Director Brian Nichols when he accepted the award at FDLIC's headquarters on behalf of Legacy Funeral Group. "Legacy has created a unique company culture that I believe drives the success of the company. We don't lose sight of the individual customer—it's all about how we can help the one family right in front of us, and that extends from the at-need side to preneed side of the business as well."

Regional Managers' Meeting: From Good to Great

By Bill Vallie, *Legacy Regional Manager*

Every year at our regional managers' meetings, we look back at our successes and our challenges to see where we have been and where we are going. The key to our success in the funeral and cemetery industry are our location managers and their entire teams, who are on the front lines meeting with and serving our client families daily. We as regional managers collectively learn about

your home town operations so that we can surpass our results from the previous year. Our goal is not just to remain "good"; we want to go from "good to great"! As our client families change, we must change with them or we will be left behind while our competition serves that family's needs. Change is good, for all of us. Rest assured, we are looking to the future and we are taking steps to be ready to serve those families when that time comes.



Legacy's regional managers were inspired to go from "Good to Great" at the latest Regional Managers' Meeting in Austin, TX

Cremation Committee Meets in Abilene, TX

On May 13th and 14th several members of the Legacy team joined together at Elmwood Funeral Home and Memorial Park in Abilene, Texas to attend a Cremation Committee Workshop. The workshop was led by Todd Noecker, Regional Vice President and Director of Cremation for Legacy. During the training, an arrangement script format was developed to assist our trainers in the

field. Our focus was on reducing our direct cremation rates by presenting value and ceremony to our cremation families. Several representatives from FDLIC also came by to provide their feedback. We are excited to share with you what we have learned. A trainer in your area will soon come by to present the new "Legacy Cremation Presentation"!



The Legacy Funeral Group Cremation Committee

Legacy Locations Celebrate Memorial Day Events



Elmwood Funeral Home & Memorial Park



Sunset Memorial Gardens & Funeral Home



Davis Funeral Home & Memorial Park

Rushing-Estes-Knowles Honors Hospice and Clergy at Annual Luncheon

Rushing-Estes-Knowles Mortuary sponsored their third annual Hospice/Clergy Luncheon honoring Uvalde hospice and area clergy members at the Rushing-Estes-Knowles Family Center on November 21, 2013. The staff served barbeque and all the trimmings to approximately 50 hospice workers and ministers from the area to thank them for their service to our community.



Hospice and clergy annual luncheon at Rushing-Estes-Knowles



It's all about the

WHY

WHY is your funeral home in business?

WHY are you a funeral director?

WHY did you come to work this morning?

Adapted from an article by Alan D. Wolfelt

Your most honest answers to these simple questions reveal a lot about you and the funeral home in which you work. You see, *why* you do what you do is more important than *what* you do and *how* you do it.

“Oh c’mon,” you might reply, “We provide the families we serve an essential service, and we do it professionally. It doesn’t really matter why we are in the business we’re in, so long as we’re doing a good job of it.”

But the truth right now is that the families you serve and your entire community are questioning the very need for funerals. According to a new survey by Funeralwise.com, only 11 percent of respondents want a traditional funeral; 37 percent don’t want a funeral at all! Doubt in the value of the funeral is rampant, and if families don’t sense an underlying passion for and commitment to the whys of funeral service when they walk through your doors, they will walk out your doors just as – if not more – unimpressed with funerals.

According to author and organizational catalyst Simon Sinek, you must start with the why if your goal is to create a successful organization. Customers are attracted to companies that inspire them. Think Apple. Think Southwest Airlines. These organizations happen to deliver great products and services, but the why of their existence goes much deeper than that. “Their products give life to their cause,” writes Sinek.

And so I challenge you to think: What is your funeral home’s cause? What is your career cause, your calling? Your deep-down cause and passion is your why. And if your

why is grounded in the essential, healing reasons we as a people have had funerals since the beginning of time, you have the potential to inspire and re-engage your community.

THE WHYS OF MEANINGFUL FUNERALS

Essentially, the funeral ritual is a public, symbolic means of expressing our beliefs, thoughts and feelings about the death of someone loved. Rich in history and rife with symbolism, the funeral ceremony helps us acknowledge the reality of the death, gives testimony to the life of the person who died, encourages the expression of grief in a way consistent with the culture’s values, provides support to mourners, allows for the embracing of faith and beliefs about life and death, and offers continuity and hope for the living.

I’ve discovered that a helpful way to teach about the functions of authentic funeral ceremonies is to frame them in the context of the “reconciliation needs of mourning” – my twist on what other authors have called the “tasks of mourning.” The reconciliation needs of mourning are the six needs I believe to be most central to healing in grief. In other words, bereaved people who have these needs met – through their own grief work and through the love and compassion of those around them – are most often able to reconcile their grief and go on to find continued meaning in life and living.

THE FUNERAL EXPERIENCE HELPS MEET GRIEVERS’ MOURNING NEEDS

Mourning Need #1:
Acknowledge the Reality of the Death

Mourning Need #2:
Move Toward the Pain of the Loss

Mourning Need #3:
Remember the Person Who Died

Mourning Need #4:
Develop a New Self-Identity

Mourning Need #5:
Search for Meaning

Mourning Need #6:
Receive Ongoing Support from Others

The next time a family walks through your door, ask yourself, “Why am I right here, right now? Why is my work important? Why is funeral service essential?” Live that inner inspiration in every moment with every family. Wear the authentic why on your sleeve, and the families you serve will gladly follow you.

Dr. Alan Wolfelt is a respected author, educator and grief counselor. Recipient of the Association of Death Education and Counseling’s Death Educator Award, he presents workshops to bereaved families, funeral home staffs and other caregivers, and teaches courses for bereavement caregivers at the Center for Loss and Life Transition in Fort Collins, Colorado, for which he serves as director. Email him at drwolfelt@centforloss.com.



Keep the small company feel.

3103 SACKETT ST. | HOUSTON, TX 77098 | (713) 529-5770