



Your participation is needed!

For more than 25 years, the Selected Independent Funeral Homes Educational Trust has helped fund educational events and research for the independent funeral home profession. We have now expanded that role to include Hardship Grants, Second Career Scholarships and other activities in funeral service.

Please read this booklet and consider how you can help improve the independent funeral profession through your contributions and support of the Trust.

ABOUT THE TRUST

The overwhelming majority of funeral homes operating today continue to be independently owned and operated, many within the same family for generations. These firms have spent countless years serving the needs of families in their communities, but who's there to help them when they need assistance and support? The Selected Educational Trust is working to be that source.

Established in 1982 by Selected Independent Funeral Homes, a non-profit trade association, the Trust is dedicated to funding the development and administration of research initiatives, assistance grants, award programs and presentation of educational programs dealing with business management,

counseling, personnel management, and other topics of importance and interest to both Selected members and independently owned and operated funeral home professionals worldwide.

The Selected Educational Trust is incorporated as a 501(c)(3) Charitable Organization recognized by the IRS as a corporation of the District of Columbia, with its principal office in Deerfield, Illinois. The Trust is governed by an independent Board of Trustees, and administrative services are provided by the staff of Selected Independent Funeral Homes. While the Educational Trust was established by Selected Independent Funeral Homes, membership in Selected is not a requirement to obtain assistance or provide a donation.

OUR HISTORY

Selected Independent Funeral Homes was founded in 1917 as National Selected Morticians, and has earned the reputation as a highly-regarded worldwide professional association of independent, locally-owned funeral homes. Selected monitors and educates its members to ensure that consumers receive the best care available. Selected members operate under strict standards including adherence to our Code of Good Practice, and they utilize best practices in serving families and their communities at all times.

In 1982, the Selected Board of Directors established an independent charitable organization called the Selected Independent Funeral Homes Educational Trust to fund educational and charitable activities of interest to the membership of Selected and their employees. Over the years the Educational Trust has provided financial support to help fund educational programming on business management, funeral practice, personnel management and emerging trends.

The Educational Trust has also provided funding to the association to help off-set expenses incurred in creating and maintaining funeral and memorial resources and guidance offered via their web site at www.selectedfuneralhomes.org. These consumer resources include grief and bereavement information and assistance as well as helpful guidance on the various types of preplanning and funeral options.

Since the Trust receives administrative services and shares in the use of other resources including accounting and legal services with Selected Independent Funeral Homes, the Educational Trust reimburses the association annually for its share of these necessary operating expenses.

In 2009, the association Board of Directors agreed to institute various enhancements to the Trust to fulfill new legal requirements imposed by the IRS on charitable organizations and to expand the benefits of the Trust. The size and scope of the Educational Trust's Board of Trustees increased. There are now seven Trustees of the Educational Trust Board each serving a three-year term, with the Executive Director of Selected Independent Funeral Homes serving as the Administrative Trustee. The Board meets quarterly by teleconference.

“We are accustomed to helping families through hardships and know that in our line of work, our colleagues never hesitate to help out someone in need. Now we’ve experienced the generosity of the Selected Trust during our own time of need and feel extreme gratitude and comfort knowing that we can count on our own.”

– Cade Williamson, president and owner of Legacy Funeral Home & Cremation Center Inc., Hardship Grant recipient in 2011

OUR BOARD OF TRUSTEES

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GRANTS AND SCHOLARSHIPS

HARDSHIP GRANT

In an effort to provide direct assistance to independently owned and operated funeral homes experiencing hardship, the Selected Educational Trust established a Hardship Grant program.



Any independently-owned and operated funeral home that has been adversely affected by a natural disaster, fire or flood is eligible to apply for the Hardship Grant, to be used to pay for operating expenses not covered by insurance and/or other needs as identified by the applicant. Grants are awarded up to two times each year in amounts of \$3,000; \$6,000 or other amounts.

SECOND CAREER SCHOLARSHIP

Funeral service is a highly-regarded career where high-quality levels of service, care and business acumen are necessary at all times.



This career choice has traditionally been filled by generations of family members who have owned and operated funeral firms for decades. While this continues to be the case, there has been a noticeable increase in the number of second-career practitioners who desire to work in the funeral service profession. We anticipate this trend

“I am grateful to the Trust for extending me this very helpful and timely award. It will go a long way toward ensuring the well-being of my family of five, my continued progress through mortuary school, and my passionate desire to serve families well as a funeral director.”

– John Gawronski, Second-Career Scholarship winner

to continue and in an effort to offer our support, the Selected Educational Trust has established this scholarship program specifically for these individuals.

Up to four (4) \$1,500 Scholarships are awarded annually through the Selected Educational Trust.

Application forms for all funding opportunities can be easily downloaded from our website at www.selectedtrust.org.

ANNUAL

FUNDRAISING GALA

Taking place in conjunction with the Annual Meeting of Selected Independent Funeral Homes, the Educational Trust’s Fundraising Gala is an important and popular annual event. The inaugural Gala took place in October of 2010 and it featured a great evening of food, drink, entertainment, and interaction among Selected members, guests and supporters of the Trust. A silent auction also took place during the event featuring some rare and valuable items. In all the Gala was well-attended and helped to raise important contributions to the Trust. The next Fundraising Gala will take place in September of 2011 in Scottsdale, AZ.

OTHER ACTIVITIES

The Selected Educational Trust will continue to fund education programs and initiatives offered through Selected Independent Funeral Homes for both members of the association and non members. The Board continues to explore ideas, including research, awards, or other programs that would benefit the independent funeral home profession. Suggestions are welcome.

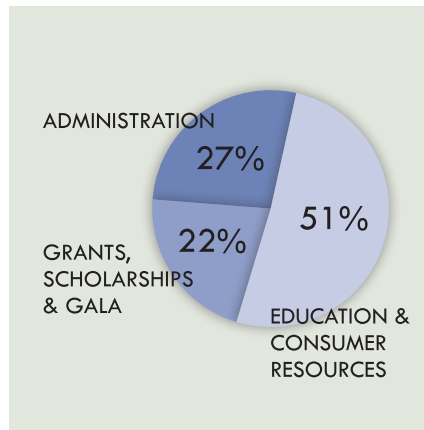
Recently, the Educational Trust provided over \$10,000 on behalf of the association to help fund the 2010 Edition of the FAMIC Study. FAMIC stands for the Funeral and Memorialization Information Council and is comprised of the leading associations in the death-care profession. The FAMIC Study (formerly known as the Wirthlin Study) measures consumer attitudes toward the entire funeral profession and is an important source of information for all practitioners. This study is costly since nearly 2000 consumers participate in in-depth interviews to gain unbiased feedback.

FUNDRAISING EFFORTS

Since its inception, the Educational Trust has utilized professional investment guidance to establish and maintain a safe and productive portfolio of investments. The Board of Trustees requires our investment advisors to adhere to our Investment Policy Statement to ensure discipline and long-term consistency in our investments.

Annually, the Trust funds its own administration costs, education and support activities in the profession for an average expense

amount of \$150,000. Our goal is to raise enough money from donations annually to be able to pay these expenses without having to reduce our principle investment or borrow funds from the association. We require your continued financial support to accomplish this! We currently are in the second year of a fundraising campaign to raise \$180,000 by September of 2011 and every dollar donated is critical to achieving this important milestone in our history. We are hopeful you will take time to contribute to the Trust. See the options below.



TRUST ANNUAL SUPPORT

HOW YOU CAN PARTICIPATE

Listed below are the various ways and levels of contributions we ask you to consider. Donations can be from individuals, companies, family trusts and endowments and can be made one-time or set up to take place annually. See the enclosed "Gifting Levels" form for specific amounts and details.

PYRAMID BUILDERS

Companies and individuals interested in on-going annual financial support to the work of the Trust are recognized as Pyramid Builders of the Selected Educational Trust. Areas of financial focus may be specified in certain circumstances.

ENDOWMENT

Companies, families or individuals can help the Trust by establishing permanent funding by a company, family or personal trust set up specifically for ensuring continuity of supporting our goals and efforts. Areas of support can be specified in certain circumstances, including a named trust for an unrestricted gift, or a named funding grant as a restricted gift with a specified use of the monies provided. Both naming opportunities receive the highest level of acknowledgment for their support.

GALA SPONSORS

In conjunction with the Annual Fundraising Gala, companies or individuals can demonstrate their support by funding specific aspects of the event. These include drink tickets, table décor, underwriting the entertainment for the evening and the silent auction, where valuable products and services are offered for donations to the Trust.

PATRONS OF THE TRUST

Companies or individuals who support the trust at varying levels of financial participation. Levels of support include Platinum, Gold, Silver and Sustaining contributors, all of whom receive varying levels of recognition on the web, in print and in public forums.

All support for the work of the Educational Trust will receive appropriate public recognition and gratitude, ensuring that practitioners of the independent funeral profession are aware of supporting companies and individuals. Recognition will include the listing of all contributors in print and online, public acknowledgement at the Annual Meeting and in a direct mailing to the membership thanking donors for their participation.

CONTACT

For more information on any of the above levels of participation, please contact Rob Paterkiewicz at 1-888-70-TRUST or via email at robp@selectedtrust.org.