

Dear Licensing Authority,

At the request of one of your licensees, I am submitting our request for continuing education approval for my program, Be The Most Valuable Funeral Director You Can Be Workshop on Friday, October 21, 2016.

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,

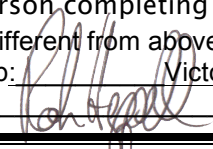
A handwritten signature in black ink, appearing to read 'Robin Heppell', written in a cursive style.

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 FuneralDirectorCEUs.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: <u>Most Valuable Funeral Director Workshop</u>		Number of CE Hours Requested: 6	
Program Date(s): September 10, 2015		Program Locations: Live / Online Webinar	
Program Description: (A program outline, including times for all portions of the program and any breaks must be attached.) See attached			
Method of Instruction: (check all that apply) Self Study: <input type="checkbox"/> audio <input type="checkbox"/> audio/video <input type="checkbox"/> exam <input type="checkbox"/> book/printed material <input type="checkbox"/> online (attach study materials and exam samples & procedures) Classroom: <input type="checkbox"/> lecture <input type="checkbox"/> panel discussion <input checked="" type="checkbox"/> video/teleconference <input type="checkbox"/> 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 #: Robin Heppell, Victoria, BC – 250-744-3595	
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="checkbox"/> Sponsor <input checked="" type="checkbox"/> Instructor Other: _____ (sample certificate of attendance attached with certifier's name and address)			
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 checked="" type="checkbox"/> Yes If yes, who? British Columbia and Alberta (attach documentation)			
Will this program be open to all licensees? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Fee Amount Charged: \$149.00 To register contact: Robin Heppell at: (250) 744-3595 / (800) 810-3595 or visit www.FuneralDirectorCEUs.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: August 20, 2015 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:

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 -
 ____6____ 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 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

TITLE: Most Valuable Funeral Director Workshop

Description: In this two part, six hour workshop, Robin Heppell, CFSP, will facilitate an interactive workshop that has been created to give individual funeral directors some insights and suggestions on how to be a MVFD - Most Valuable Funeral Director.

In the first session, "How to be an All Star Funeral Director" Heppell will focus on three main areas: General attitude, personal skills and specific funeral skills. This training is derived from over 25 years experience as a funeral director, serving as a faculty member of the Canadian College of Funeral Service and dealing with hundreds of Funeral Homes throughout North America. This will be a interactive session and audience participation is encouraged as Heppell is the first to say that "we can all learn from each other's experiences."

In the second session, "How to Promote Yourself and Your Funeral Home" Heppell will share his top 10 strategies for self-promotion. The strategies can be applied either to the individual or to the funeral home in general. Many of the strategies are either no cost or very little cost to implement. Attendees will learn how to use press releases, social media, online reviews and other strategies to be seen as the funeral or cremation expert in your area.

Objective: The objective of this training session is to empower the individual funeral director to be the most valuable that she or he can be for their firm. After completing this training session the attendee will have a better understanding of what they can do to help their funeral homes both in the facilitation of services and the overall promotion of the firm – which ultimately leads to serving more client families and providing them a more positive experience.

Attendees will be equipped with a number of worksheets and step-by-step checklist so that if they wish they can easily implement the strategy shared during the session.

Agenda (Times noted are in Pacific Daylight Time)

9:00 am	to	9:15 am	Welcome, Introductions & Orientation about Online Seminars and GoToWebinar
9:15 am	to	10:15 am	How to be an All Star Funeral Director – Part 1
10:15 am	to	10:30 am	Break
10:30 am	to	12:00 pm	How to be an All Star Funeral Director – Part 2
12:00 pm	to	12:30 pm	Break for Lunch
12:30 pm	to	1:30 pm	How to Promote Yourself and Your Funeral Home – Part 1
1:30 pm	to	1:45 pm	Break
1:45 pm	to	3:00 pm	How to Promote Yourself and Your Funeral Home – Part 2
3:00 pm	to	3:30 pm	Q and A for Attendees

Program Facilitator/Instructor(s):
Robin Heppell, CFSP (Facilitator / Presenter)

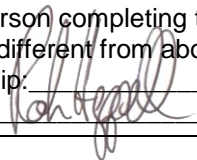
Faculty/Instructor(s) Company, City, State, Phone #:
**c/o Robin Heppell
 Box 8723, Victoria, BC, V8W 3S3 – (250) 744-3595**

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: _____ Date: July 31, 2015

Signature:  Phone: 250-744-3595 Fax: 250-483-5455



August 25, 2015

SENT BY E-MAIL: robin@FuneralFuturist.com

Provider Number: 1067
Robin Heppell, CFSP
FuneralDirectorCEUs.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:	Most Valuable Funeral Director Workshop		
Event Number:	15-6716	Contact Hours:	6
Event Date:	09/10/15	APFSP Category:	A
Event Type:	Instructor Led/Web	APFSP CEUs:	0.6

Please include the Course Number (15-6716) 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 6 Contact Hours (APFSP Category A, 0.6 CEUs). Course Number 15-6716 is presented by FuneralDirectorCEUs.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 and cemeteries
- Facilitated and managed multi-million dollar trust rollovers
- Consults for companies in marketing and promotion (both funeral and cemeteries)
- 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 of funeral plans and cemetery lots
- 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)
- 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 funeral home and cemetery pre-need

Funeral Home and Cemetery Marketing

- Operates FuneralFuturistWebsites.com (division of FuneralFuturist.com) that provides website development, support and training of funeral home and cemetery websites
- Familiar with all forms of marketing media: direct mail, print, radio, television, banner, pay per click, etc.
- Websites built with Ease of Use, Search Engine Optimization, Social Engagement, Mobile Responsiveness and Lead Generation as key success factors
- Experience in column / article writing and press release submission
- Former 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)
- Formerly instructed Marketing courses for cemeterians and funeral directors at the ICCFA University
- Speaker in the areas of Strategy, Competition, Marketing and Technology for ICCFA & NFDA Conventions as well as numerous conferences for Provincial and State Associations
- Creator and facilitator of the Funeral Marketing Blueprint program and 2 day workshop

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

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
Cemetery Crew	Laurel Hill Cemetery (Bolton, ON)	1986

Robin Matthew Heppell, CFSP

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

Email: robin@funeralfuturist.com

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