

# The Funeral Industry: Consumer Preference vs. Industry Standards

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## COURSE OBJECTIVES

- Motivate. Inspire. Provide solutions.
- Connect challenges we've faced to your own.
- Introduce real-world solutions you can implement today.

## COURSE DESCRIPTION

### *Discuss Funeral & Banking:*

- Old vs. New
- Consumer Preferences
- Streamlined Business Practices
- Technology Solutions

### *Learn to Secure Capital for:*

- Executing a Generational Transfer
- Serving Changing Customer Needs
- Purchasing the Business
- Making a Significant Investment

## OLD vs. NEW

- Challenges of Generational Ownership
- You Need Capital for Generational Succession
- The Numbers Behind Succession

## CONSUMER PREFERENCE vs. INDUSTRY PREFERENCE

- Current Industry Standard (Banking & Funeral)
- Benefits of a Lender with Industry Experience

## STREAMLINED BUSINESS PRACTICES

- Both Industries can be Inefficient
- How to Streamline

## TECHNOLOGY SOLUTIONS

- Digital Experience
- Why Technology?
- SBA Loan Features: Loans for Technology

## THOUGHTFUL LOAN SOLUTIONS

- State of the Bank Union

### *You Need Capital for Business Reinvestment*

- What's Crucial for Funeral Growth?

### *Banks Don't Understand the Industry*

- Stephanie Dunn of First Bank SBA does, she works with people like Walker all day long.

## THE FIVE Cs OF CREDIT

## BANKING EXPERIENCE MEETS FUNERAL EXPERIENCE



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