



# PRISM

## Technology Designed For Your Success.

Funeral Services, Inc. (FSI) developed PRISM, an innovative online platform on FSITrust.com that puts you in complete control of your preneed and perpetual trust accounts. With just a few clicks of the mouse, you'll have access to all of your preneed contracts' details in one easy-to-manage location.

FSI is the only trust administrator to offer this comprehensive solution to the death care profession.



TRUST SOLUTIONS



## PRISM: Built to Integrate

- Download FSI's FREE eContract and eRemote preneed software – *All compatible with Windows desktop and laptop computers. eContract also available on Microsoft Surface Pro.*
- Create digital preneed contracts with automatic calculation using eContract
- Download FSI's error-free payment calculator app to ensure payment schedules are balanced on paper contracts
- Secure your data by instantly uploading digital contacts to FSITrust.com
- Upload a general price list and new merchandise online to update your eContract software automatically
- Upload and store key associated documents, such as arrangement forms, and copies of insurance policies
- Duplicate similar contracts for family members, among others, to streamline the sales process



## PRISM: Built to Secure

- Access account information 24/7 from any computer or tablet with internet access
- Control who can access contract information with employee permissions
- Access audit trails for internal-use or for regulatory audits
- Utilize your Firm-specific dashboard with:
  - Upcoming events and regulatory deadlines
  - Contract errors that need attention
  - Bounced client checks
  - Misapplied payments



## PRISM: Built to Manage

- Manage all preneed contracts in one location on your FSITrust.com account
- Access contract information to review amount paid, amount trusted and current market value
- Monitor contract statuses and preneed sales from team members
- Export data into programs such as Microsoft Excel
- View the original images of all preneed contracts 24/7
- Calculate and manage commission payments for sales team



## PRISM: Built to Sustain

- Utilize efficient client payment options:
  - Auto-debit clients' bank accounts for periodic payments
  - Complete ongoing payments with clients' credit card accounts or coupon books
  - Transfer client payments straight into trusts
- Print and provide professionally formatted preneed account statements to clients at any time
- Fulfill, cancel and default preneed contracts and have clients' funds deposited into your corporate account before 10 a.m. the next business day

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FSITrust.com

TRUST SOLUTIONS

Funeral Services, Inc: The LEADER in Death Care Trust Administration!