

Technology, Data Integrity & Where to Find Us This Season

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TRUST SOLUTIONS

An Argent Company

Build Confidence Through Technology and Transparency

As our profession evolves, the importance of accurate, secure and accessible preneed records has never been greater. Technology isn't just a convenience, it's a safeguard for your business, families and long-term compliance. At the same time, market conditions continue to reinforce the value of disciplined trust management and careful oversight. You don't have to navigate it alone.

We remain committed to delivering recordkeeping resources that protect data integrity and reduce risk. You'll also notice the first phase of our refreshed brand and website — designed to make the tools and information you rely on every day easier to access.

I also look forward to connecting with many of you during this year's conference season. These conversations and time spent learning together are invaluable as we continue to support your success in an increasingly complex landscape.

We look forward to connecting,



Jack Hirsch
President, Funeral Services, Inc.



Good Recordkeeping Protects Your License

By Wendy Russell Wiener, WRW Legal



Every preneed seller in every state is subject to audit by its state regulator. Those audits can go smoothly ... or not. The difference, in our experience, is almost always the quality of the records that are submitted by the preneed seller to the auditor.

Assuming you are properly licensed, lawfully selling preneed, making required trust deposits and correctly withdrawing funds from trust, the only disparity between a clean audit and one that supports a disciplinary matter is the correctness and completeness of the information submitted to the regulator. Failure to accurately document trust deposits, including the timing of the deposits, and trust withdrawals, including submission of supporting records, will result in disciplinary action leading to fines, probation, suspension and even revocation of licensure.

Over its nearly 50 years, FSI has often been asked by regulators of various states for guidance on audit documentation requirements. FSI has literally “written the book” on how to successfully navigate a regulatory audit of preneed records.

A Fresh Look. Same Trusted Partner.

We’ve launched a new website and refreshed branding, designed with you in mind. The updated experience features a more modern look, improved navigation and easier access to the resources you need. While our appearance has evolved, our commitment to accuracy, service, and trusted partnership remains exactly the same.

“Technology isn’t just a convenience, it’s a safeguard for your business, families and long-term compliance.”

[Click Here | Visit New Website](#)

■ FEATURED INSIGHT/CLIENT STORY

Preneed Programs Are A Strategic Asset In Succession Planning

Strong recordkeeping is the foundation of effective preneed trust administration – especially when a business owner is considering a succession plan.

This article by FSI president Jack Hirsch with Southern Funeral Director explores how firms can leverage data management, consistent documentation practices and technology-driven oversight to reduce risk and support long-term compliance. These fundamentals can help deathcare professionals better serve families while protecting their business.

[Click Here | Read Full Story](#)

■ CONFERENCE SEASON

Where To Find Us This Fall

We hope to connect with you at one of the many industry events this season. Here's where you can find us:

- **ICCFA University** – Don't miss former FSI president Bill Williams' session on 'Funeral Home and Cemetery Accounting: Keys to Affecting Your Bottom Line'

- **FCCFA Annual Convention:** Visit us at our booth
- **NFDA Leadership Conference**

Stop by our booth or reach out to our team to schedule some time together.



TRUST SOLUTIONS

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Strengthen Your Records. Strengthen Your Trust.

Contact our team today to learn how our secure recordkeeping technology can enhance data accuracy, reduce risk and support your long-term goals.

Contact Us Today

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