

# Insurance Seminar

## November 1, 2016

### OFDA Headquarters



Ohio Funeral  
Directors Association  
2501 North Star Rd.  
Columbus, OH 43221

#### Insurance Ethics in Client Negotiations (AM session)

**7:00–7:30 AM**  
**Registration**

- Professional behavior

**7:30 AM–12:00 PM**

- Developing and maintaining ethical client relationships
- Making ethical judgments

- Sources of ethical problems
- Building and improving ethical foundations
- Keys to ethical decision making

*The registration fee covers speaker expense, Ohio Department of Insurance fees, continental breakfast, lunch, and breaks.*



- Ethics and technology
- Ethics in the marketplace

*This course satisfies the **ETHICS** three hour training requirement set forth by the Ohio Department of Insurance.*

- The cost of unethical relationships

#### Insurance Funded Funerals (PM session)

**12:30 –5:00 PM**

- Funeral directors as preneed insurance agents
- Ethical considerations
- Professional responsibilities

- Other insurance issues
- Common sense insurance ethical issues
- Integrity—insurance disclosure issues

- Responding to client questions and concerns about preneed insurance



#### Continuing Education Credits for Insurance

Please complete the registration form and return it to the OFDA office, or register online at [ofdaonline.org](http://ofdaonline.org)

**Seating is limited to 50 participants. Payment-in-full must accompany registration form.**

Seminar cancellations must be received by **7:30 AM, October 31, 2016** to receive a full refund.

**Register at**  
**[ofdaonline.org](http://ofdaonline.org)**

## About our presenter



**Steve Whitaker**  
Homesteaders  
Educational Services

**Steve Whitaker** is the Director of Educational Services for Homesteaders. He joined Homesteaders in 1994 where he is responsible for the administration of continuing education programs, as well as the development and implementation of continuing education courses.

He has recently completed several courses in Training Design Methodology, Needs Analysis and Adult Learning Concepts.

Prior to joining Homesteaders, he designed and conducted more than 30 performance-based training packages for a large telecommunications company.

Steve is a Certified Preplanning Consultant and Trainer. He has spoken for the National Foundation of Funeral Service, at NFDA conventions, and has taught insurance and funeral service continuing education courses in many states.

Receive five insurance  
CEC's for EACH session.

## Integrity

is doing the right thing  
even when no one  
is watching

C.S. Lewis

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## Registration

AM PM BOTH

Name ☐ ☐ ☐

Name ☐ ☐ ☐

Name ☐ ☐ ☐

Funeral Home

City, State, Zip

E-mail address

National Producer Number

National Producer Number

National Producer Number

**\$129 (\$258 Non Member) both sessions**  
**\$69 (\$138 Non Member) AM or PM session**

***Make Checks payable to OFDA or  
provide credit card information below:***

Total amount enclosed

Cardholder's Name

Credit Card # (circle one) VISA MC AMEX DISC

Expiration date security code

Cardholder's signature

Billing address

City, State, Zip