

# Memorial Business Journal

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NFDA

NATIONAL  
FUNERAL  
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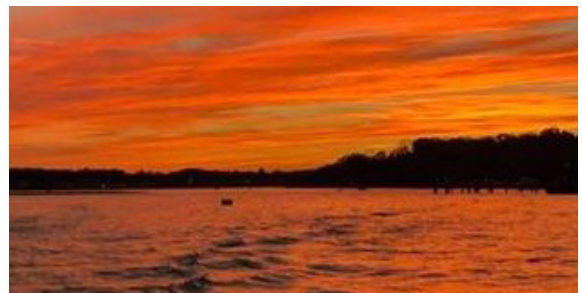
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## New Support for the Brave of Heart

By Tanya Kenevich

**NEW YORK CITY** – In times of fear and uncertainty, society often bands together in support. During the current COVID-19 global pandemic, no one has shown this support more than the selfless healthcare workers and volunteers caring for those affected by this illness – many on the front lines and often in dangerous situations. Sadly, some of these heroes have fallen due to the coronavirus, creating a precarious present and future for their families, who are suffering emotionally and financially.

The “Brave of Heart Fund” was born to help combat some of the compounding problems faced by the families of healthcare workers and volunteers who died due to COVID-19. According to its website, “the fund is designed to provide financial support in the form of charitable relief grants to support the families of healthcare workers who lose their lives to COVID-19.”



In addition to providing financial support, Cigna – a partner of this collaboration – will also provide emotional support and services to these families.

The Brave of Heart Fund was the brainchild of New York Life Insurance Company, the nation’s largest mutual life-insurance company and one of the largest life-insurance companies in the world, according to Fortune. Heather Nesle, president of the New York Life Foundation and vice president of New York Life’s Corporate Responsibility Department, said the idea for the fund started from a place of purpose and mission: “We are here to provide financial security and peace of mind – through good times and bad. We knew we had to do something during this time of crisis. We thought about what we do every day, and the idea for Brave of Heart was born.”

The New York Life Foundation is no stranger to large, and sometimes overwhelming, projects. The

foundation devotes the majority of its funding each year to programs that help children in the areas of educational enhancement and childhood bereavement. Since its founding in 1979, the foundation has contributed more than \$350 million to U.S.-based nonprofit organizations.

The foundation knew, however, that partnerships would prove essential to take care of as many components as possible related to COVID-19. Cigna was an easy choice. “Our two companies are uniquely positioned to be there for people in times of need – providing them with peace of mind today, while also helping protect their futures with hope for a better tomorrow,” Nesle said. “As a life insurer, New York Life does this by helping families send their kids to college, pay their bills, and stay together in their homes. As a health-services company, Cigna supports every individual to live their healthiest life, both in body and mind.”

In addition to Cigna, E4E Relief was brought in to get the grant money to families who need it the most. E4E Relief is well-versed in dealing with troubling societal situations – beginning in 2001 in the aftermath of 9/11, it is a leader in the employee relief-fund space after nearly two decades.

E4E Relief is also a wholly owned subsidiary of the Foundation For The Carolinas, the sixth-largest community foundation in the U.S. “As a nonprofit social enterprise, they are laser focused on disaster and personal hardship relief effort, which makes them well suited for this program,” Nesle said. “I can’t say enough about the effort they put forth to get this fund up and running.”

Nesle noted that it took a lot of work to iron out all the details so the fund could start helping these families as quickly as possible, but that the foundation was lucky to have such an experienced partner in E4E Relief. “A core team worked seven days a week, for three to four weeks,” she said. “I think you can move mountains if you have a purpose and common goal, and it was an initiative that we knew we had to launch quickly to be able to secure funding and start helping these families in need.”

With the New York Life Foundation, Cigna and E4E Relief on board, it was time to develop this new charitable entity. “[We] worked around the clock for weeks to develop the fund and get it off the ground,” Nesle said. “The fund launched with initial contributions of \$25 million each from the New York Life Foundation and Cigna Foundation. To further support the fund, the New York Life Foundation is also providing a dollar-for-dollar match on the first \$25 million in individual donations received.”

According to Nesle, offering a match is an incentive for people to give. “Individuals want to be sure their smaller donations have maximum impact. It’s also a strategy to get as many people talking and sharing information about the fund as we can,” she said. “When more people know about the fund, we can reach more eligible families.”

Through the Brave of Heart Fund, Cigna has also committed to provide behavioral and emotional health support to families to help them cope with grief. The company also launched its Mindfulness for Healthcare Workers program, which provides training in mindful stress-management, acceptance, and compassion for all healthcare workers and families.

## **HITTING HOME**

It became obvious that this fund was incredibly important to healthcare workers, volunteers and their families. “I think Chairman and CEO Ted Mathas said it best,” Nesle said. “In tough times, true heroes are revealed. The heroes today are not only the courageous and selfless frontline healthcare workers and volunteers who, without hesitation and without question, have put themselves in harm’s way to help those who desperately need it, but also their families who are living with the anxiety and fear of what may happen to their loved ones in the days ahead.”

Nesle added, “The Brave of Heart Fund is our way to honor these heroes by doing what New York Life and Cigna do best – supporting these individuals and their families with financial and emotional

support and being there when we are needed most.”

Nesle, who has been with New York Life for nearly seven years, has loved every minute. “I feel fortunate to work for a company that is truly committed to being there for our communities and one that shows up in times of crisis,” she said.

“Crisis” has been an understatement for the past several months, and Nesle, a Manhattan resident, has also been personally affected by the pandemic. According to August 17, 2020, data on the Centers for Disease Control and Prevention’s website, New York City’s confirmed cases for COVID-19 are actually shown separately from the state of New York (231,624 total cases and 226,977 confirmed cases in New York City, as of the writing of this article).

“I know scores of people who have had COVID-19, and a few that have died,” Nesle said. “Yet, I am lucky – I can work from home, my family has remained safe and healthy, and we have the means to not worry about food or shelter.”

“The way New York Life has responded to COVID-19, not just through the fund, but also with the compassion and caring shown to our employees and agents, has made me grateful to work here,” she added. “Working on the fund is a passion project that got me through some of the earliest and darkest days of the pandemic. Like everyone, I am anxious about the future but also hopeful that some of the lessons we are learning now – empathy for our co-workers, respect for frontline workers (not limited to healthcare workers), and a sense of what a community working together can achieve – will stay with us and lead to a more compassionate society.”

#### **HOW THE FUND WORKS**

Although the fund is a great and innovative charitable option for affected families, it is important to understand how it works so funeral professionals can also help provide the best information possible to families that might be able to take part in it.

The Brave of Heart Fund was established to pro-

vide monetary grants to eligible family members of frontline healthcare workers and volunteers who lose their lives because of COVID-19. Eligible family members include a spouse or domestic partner, a dependent child, or a dependent parent.

“There are two phases of grants available from the fund. Eligible expenses will vary based upon which grant phase the eligible family member is applying for,” Nesle said. “The Phase 1 grant assists with funeral costs and might also assist with other immediate needs. The Phase 2 grant might assist with medical care, counseling, food, educational expenses of children and other dependents currently in school, mortgage or rent payments, and other longer-term living expenses.”

She added, “The fund seeks to provide peace of mind by covering immediate expenses and getting health and wellness services to families quickly.”

According to information from Nesle, the fund is giving up to \$75,000 in grants to the family of an eligible healthcare worker that can demonstrate financial need, which is divided in the two grant phases.

“We set up the support in phases, similar to other disaster grant programs, because when disasters occur, people have immediate expenses for basic necessities and can’t wait for a drawn-out process to receive funds,” she said. “Funeral costs are immediate and can be expensive. The short-term grant of \$15,000 is meant to get money in the hands of those who need it quickly, to alleviate some of the financial stress they are feeling.”

There are long-term effects as well in these situations, including income loss because of the death and compounding, larger financial issues. “The second phase of support might be available for continuing needs and longer-term expenses for up to 12 months. This second grant is intended to help defray expenses, such as housing, utilities, educational expenses of dependents currently in school, child care, clothing, food, transportation, counseling, and medical expenses,” Nesle said. “These grants can range up to \$60,000 and are needs-based.”

Through the fund, Cigna has also committed to provide behavioral and emotional health support to these families in need. The Brave of Heart website also provides grief resources, which have been carefully curated and compiled by the New York Life Foundation.

“For over a decade, the foundation has made a strategic commitment to support and raise awareness of grieving children and their families – and today we believe we are the largest corporate funder in the emerging grant-making area of childhood grief support,” Nesle said. “The company identified childhood bereavement as a cause without a champion and, to date, we are proud to have invested over \$40 million in support of grieving children and their families.”

According to Nesle, the foundation focuses its bereavement funding efforts on three key priorities:

1. Building capacity in the field
2. Research/evaluation initiatives
3. Direct service support

Over the years, the foundation worked with bereavement experts and well-respected organizations in the bereavement and grief space to create various resources. One of the most helpful resources, according to Nesle, is the National Bereavement Resource Guide, available on [newyorklifefoundation.org](http://newyorklifefoundation.org). This guide helps children and their families locate local bereavement centers, camps and general resources in their state.

“We wanted the beneficiaries to have free resources in addition to the monetary support, so we reached out to our extensive network to provide tried and true resources, coupled with some new information specifically related to COVID-19,” she said.

#### **FUNERAL DIRECTORS, BRAVE OF HEART & COVID-19**

We know as a society that healthcare workers and volunteers have been hit hard by COVID-19, but another profession that has also received a difficult blow is deathcare. “Even in normal times, funeral professionals have an incredibly hard task. They

need to provide both comfort and education. In many cases, they are the most trusted source of information for a family suffering its greatest tragedy. This has all been exacerbated during COVID-19,” Nesle said.

She continued: “In addition to the primary grief involved in losing a loved one, so many of these families are experiencing secondary grief – with social-distancing limiting the number of guests at a funeral service and preventing the many hugs and hands that provide comfort – and financial loss, which can turn an already difficult time into desperation.”

Because of COVID-19 limitations, funeral professionals are in a unique position to spread the word about the fund by providing information to families. In theory, this will help provide quicker and much more effective support during a very trying time. “We know that funeral professionals want to assist in any way they can, and that they feel the heartache firsthand. Being able to point eligible families to this fund might result in tens of thousands of dollars in tangible support for these families,” Nesle said.

“Another way that funeral professionals play a role is in the verification of cause of death and date of death, so that we can get families moving through the process quickly,” she continued. “Lastly, they can help us with getting the word out to other funeral homes, houses of worship, florists and other institutions that encounter bereaved families.”

#### **BEING THERE FOR THE BRAVE HEARTS**

During this critical time, it is more important than ever to be there for healthcare workers and volunteers on the front lines. “The fund honors the families of healthcare workers and volunteers who go to hospitals and medical facilities every day, knowingly putting themselves in harm’s way while working with COVID-19-positive patients,” Nesle said. “The fund is our way to support these courageous workers’ and volunteers’ families during their time of need and demonstrate our appreciation for their sacrifices during the pandemic. Those healthcare

workers currently dealing with COVID-19 also care deeply about their fallen friends and share in the goal of helping their families.”

According to Nesle, the response to the Brave of Heart Fund showed how truly needed a fund like this was. “We have heard from families who did not know how they were going to find money to cover the funeral costs for their loved one, who didn’t get to say goodbye,” she said. “Some have fallen ill themselves; many have lost their jobs. We have money to give to the people who have suffered the most. Please help us to find these families so we can

offer them some peace of mind. Their loved ones died trying to keep us safe.”

**MBJ**

*For more information, go to [braveofheartfund.com](http://braveofheartfund.com), where individuals can start the grant process by verifying eligibility to apply for a Brave of Heart Fund grant. Additional bereavement resources can be found at [newyorklifefoundation.org](http://newyorklifefoundation.org).*

*Tanya Kenevich is a New Jersey-based freelance writer who has covered the funeral service profession since 2008.*

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## Twitter and The Funeral Rule

**By T. Scott Gilligan**  
**NFDA General Counsel**

**BROOKFIELD, WISCONSIN** – What does Twitter have to do with the Federal Trade Commission’s (FTC) Funeral Rule? Only in the convoluted and tangled web of Washington, D.C., politics would the action of Twitter executives impact what might happen during the review of the FTC Funeral Rule.

Back in May 2020, President Trump tweeted attacks against the reliability of mail-in voting, claiming that it is “substantially fraudulent.” Twitter, for the first time in dealing with the president’s many tweets, posted a warning notice urging readers to fact-check the tweets because they contain misleading information about the electoral process.

Those warnings did not sit well with the president, who accused Twitter of censoring him. He promised to quickly respond against Twitter’s action. True to his word, the president signed an Executive Order on May 28, 2020, directing, among other things, that the FTC consider whether internet platforms, such as Twitter, Facebook, Instagram and YouTube, commit unfair or deceptive acts or practices when they restrict speech posted to their platforms. Trump then doubled down by personally meeting with FTC Chair Joseph Simons in the

Oval Office and urging him to lead an FTC investigation against several media companies’ alleged censorship of conservatives.

Despite the president’s insistence that the FTC take action, Simons indicated to Congress on August 5, 2020, that the FTC is unlikely to pursue social-media platforms. Testifying at an oversight hearing before the Senate Commerce Committee, the chair informed senators that the FTC does not have jurisdiction to police political speech. “Our authority focuses on commercial speech, not political content curation,” Simons said. “If we see complaints that are not within our jurisdiction, then we don’t do anything.”

Trump’s Executive Order also directed the Federal Communications Commission (FCC) to investigate Twitter. When FCC Commissioner Michael O’Rielly stated during a July 29, 2020, speech that the agency was not inclined to undertake that investigation because of First Amendment concerns, the Trump administration withdrew O’Rielly’s nomination for a new five-year term on the FCC five days later. Like Simons, O’Rielly found out that opposition to Trump’s orders has adverse consequences.

Although nothing official has been announced by

the White House, the reluctance of Simons to go after Twitter might end up costing him his job. In late August, it was reported that the White House is looking for his replacement. Simons has not announced that he is leaving, but he has asked his staff to promise to stay with the agency until the end of the year. Moreover, he recently moved his chief of staff to a leadership position within the commission that would allow her to remain with the FTC if he departs.

Since the FTC is an independent agency, the president does not have the authority to remove a commissioner without a showing of gross negligence. The president does have the discretion to strip Simons of his position as FTC chair, however, and it is expected that if Trump wins in November, Simons will probably step down before the end of the year.

As for a possible replacement, it was reported that John McEntee, who heads the White House Personnel Office, has already conducted informal interviews of potential replacements for Simons. Among those rumored as a possible replacement is Gail Slater, who previously worked at the FTC on privacy issues and is now an executive at Fox News.

While it is impossible to know whether Simons'

possible departure would have any impact on the FTC's review of the Funeral Rule, he does have an extensive background with the commission, having worked for the FTC as far back as 1987 when the existing Funeral Rule was first reviewed. His history, as well as his conservative economic leanings, might have led him to resist attempts to expand the rule by requiring funeral homes to post prices online. Having seen that the Funeral Rule failed to either increase price shopping among funeral consumers or hold down funeral prices, Simons might have felt reluctant to increase regulation over funeral homes by requiring the posting of funeral prices online.

Of course, even if President Trump replaces Simons, the new appointee will likely have a conservative bent. However, with two Democrats on the five-person commission having already voiced their concerns about consumer access to funeral prices, it is probable that it will take a united front by all three Republicans on the commission to stop an expansion of the Funeral Rule. Stay tuned.

**MBJ**

*T. Scott Gilligan is general counsel for the National Funeral Directors Association.*

## NFDA Recognizes Funeral Homes For Excellence

**BROOKFIELD, WISCONSIN** – The National Funeral Directors Association (NFDA) is pleased to announce that 141 funeral homes earned a 2020 Pursuit of Excellence Award. This award is presented by NFDA annually to firms that demonstrated their commitment to raising the bar on funeral service excellence by adhering to strict ethical and professional standards and providing outstanding service to families and communities.

“This has been a challenging year for funeral homes,” said NFDA Director of Public Relations Jessica Koth, who manages the program. “The Pursuit of

Excellence Work Group was very impressed with the quality of this year's entries and all that funeral homes have been able to accomplish during the pandemic. The funeral homes that NFDA is recognizing with the Pursuit of Excellence Award have truly earned it this year.”

To earn an NFDA Pursuit of Excellence Award, a funeral home must demonstrate proficiency in key areas of funeral service, including compliance with state and federal regulations; staff participation in ongoing education and professional development; offering outstanding programs and resources to

bereaved families; maintaining an active level of involvement in the community; active participation in and service to the funeral service profession; and promoting funeral home services through a variety of marketing, advertising and public-relations programs. Participants are also required to adhere to a Pledge of Ethical Practices.

Information about the NFDA Pursuit of Excellence program can be found at [www.nfda.org/pursuitofexcellence](http://www.nfda.org/pursuitofexcellence). Registration and application materials for 2021 will be available in late-October 2020.

### **BEST OF THE BEST AWARD RECIPIENTS**

All Pursuit of Excellence applicants submitted an essay describing the development and execution of a program or service that had a positive impact on the families they serve or their community, qualifying them for the Best of the Best Award, which recognizes the most novel and innovative programs and services in the profession.

Essays were judged on the uniqueness of the idea on a national and international level; quality of implementation; benefit to those served; benefit to the funeral home; and how easily the idea could be replicated or modified by another funeral home. After a thorough review, the Pursuit of Excellence Task Force selected seven funeral homes to receive the Best of the Best Award:

- Arlington Memorial Chapels, Quezon City, Metro Manila, Philippines
- Funeraria San Vicente S.A., Medellin, Colombia
- Gardinier Funeral Home, Inc., Franklin, Pennsylvania
- Lakeside Memorial Funeral Home, Inc., West Seneca, New York
- Macz Funeral Homes, Centralia, Illinois
- Morrissett Funeral & Cremation Service, North Chesterfield, Virginia
- Worlein Funeral Home, Austin, Minnesota

As they reviewed the essays to select the Best of the Best honorees, the Pursuit of Excellence Task Force noted a number of programs and services that were very well executed and yielded positive results for

the community served by the funeral home. The task force recognizes these funeral homes with a Certificate of Honorable Mention:

- Cannon Cleveland Funeral Directors, McDonough, Georgia
- Copeland Funeral Service, Beaufort, South Carolina
- Patrick T. Lanigan Funeral Home & Crematory, Inc., East Pittsburgh, Pennsylvania
- Pixley Funeral Home, Rochester, Michigan
- Radney Funeral Home, Alexander City, Alabama
- Reichmuth Funeral Home, Elkhorn, Nebraska

### **NFDA HALL OF EXCELLENCE INDUCTEES**

NFDA-member funeral homes are inducted into the Hall of Excellence upon receiving their 10th Pursuit of Excellence Award. In recognition of their consistent display of professional and ethical excellence, four funeral homes have been inducted into the NFDA Hall of Excellence in 2020:

- Arlington Memorial Chapels, Quezon City, Metro Manila, Philippines
- Baskerville Funeral Home, Wilmington, Illinois
- Brandon G. Thompson Funeral Home, Hammond, Louisiana
- Howard K. Hill Funeral Services, New Haven, Connecticut

A number of funeral homes achieved milestones in their participation in the Pursuit of Excellence Award program in 2020. NFDA salutes the following funeral homes for their ongoing commitment to excellence:

### **15TH PURSUIT OF EXCELLENCE AWARD**

- Caldwell & Cowan Funeral Home, Inc., Covington, Georgia
- Gamble Funeral Service, Savannah, Georgia
- Roller-Daniel Funeral Home, Searcy, Arkansas
- Weeks' Enumclaw Funeral Home, Enumclaw, Washington
- Weeks' Funeral Home, Buckley, Washington

### **20TH PURSUIT OF EXCELLENCE AWARD**

- David C. Brown Funeral Home, Belleville, Michigan
- D'Esopo East Hartford Memorial Chapel, East Hartford, Connecticut

- D’Esopo Funeral Chapel, Wethersfield, Connecticut
- Gunderson Funeral and Cremation Care, Madison, Wisconsin
- Memorial Funeral Home – San Juan, San Juan, Texas

Center, Pineville, Kentucky

**35TH PURSUIT OF EXCELLENCE AWARD**

- MYERS MORTUARY – BRIGHAM CITY, BRIGHAM CITY, UTAH

**40TH PURSUIT OF EXCELLENCE AWARD**

- Myers Mortuary - Ogden, Ogden, Utah
- Myers Mortuary - Roy, Roy, Utah

**25TH PURSUIT OF EXCELLENCE AWARD**

- Arnett & Steele Funeral Home & Cremation

**2020 NFDA PURSUIT OF EXCELLENCE AWARD RECIPIENTS**

*\*First-time award recipient*

*\*\*Previously inducted into the NFDA Hall of Excellence*

- 
- A.J. Desmond & Sons Funeral Directors, Troy, Michigan\*\*
  - Anderson Funeral & Cremation Services, Belvidere, Illinois
  - Anderson Funeral Home and Crematory, Alexandria, Minnesota
  - Ang Chin Moh Funeral Directors Pte., Singapore
  - Arlington Memorial Chapels, Quezon City, Metro Manila, Philippines
  - Arnett & Steele Funeral Home & Cremation Center, Pineville, Kentucky\*\*
  - Arrington Funeral Directors, Jackson, Tennessee

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- Baird Funeral Home, Troy, Ohio\*\*
  - Baskerville Funeral Home, Wilmington, Illinois
  - Bayliff & Son Funeral Home, Inc., Cridersville, Ohio
  - B.C. Bailey Funeral Home, Wallingford, Connecticut
  - Belgroves Funeral Home Company, Ltd., San Fernando, Trinidad & Tobago
  - Brandon G. Thompson Funeral Home, Hammond, Louisiana
  - Brown Funeral Home and Cremation Service, Niles, Michigan\*
  - Brunswick Memorial Home, East Brunswick, New Jersey

- 
- Caldwell & Cowan Funeral Home, Inc., Covington, Georgia\*\*
  - Cannon Cleveland Funeral Directors, McDonough, Georgia\*\*
  - Capillas Senoriales Casa de Homenajes, Guatemala\*
  - Carmon Funeral Homes, Windsor, Connecticut\*\*

- Carpino Funeral Home, Southbury, Connecticut
- Chambers and James Funeral, Pet & Cremation Services, LLC, Wellsburg, West Virginia
- Christopher Mitchell Funeral Homes, Inc., Albion, New York
- Copeland Funeral Service, Beaufort, South Carolina
- Cozean Memorial Chapel & Crematory, Farmington, Missouri\*\*
- C.R. Lyons & Sons Funeral Directors, Danvers, Massachusetts

- 
- David C. Brown Funeral Home, Belleville, Michigan\*\*
  - D’Esopo East Hartford Memorial Chapel, East Hartford, Connecticut\*\*
  - D’Esopo Funeral Chapel, Wethersfield, Connecticut\*\*
  - Dieters Funeral Home and Crematory, Ltd., Washington, Illinois\*\*
  - Dobratz-Hantge Funeral Chapel, Hutchinson, Minnesota\*\*
  - Duckett-Robinson Funeral Home, Central, South Carolina\*
  - Duksa Family Funeral Homes at Burritt Hill, New Britain, Connecticut\*\*
  - Duksa Family Funeral Homes at Newington Memorial, Newington, Connecticut\*\*
  - Dwayne R. Spence Funeral Home, Canal Winchester, Ohio\*\*
  - Dwayne R. Spence Funeral Home, Pickerington, Ohio\*\*

- 
- Edline-Yahn & Covington Funeral Chapel, Kent, Washington

- 
- Falco Caruso & Leonard Funeral Home (Camden), Camden, New Jersey
  - Falco Caruso & Leonard Funeral Home (Pennsauken), Pennsauken, New Jersey

- Feeney Funeral Home, Ridgewood, New Jersey\*\*
- Finch & Finch Funeral & Cremation Service, Altavista, Virginia
- Frank E. Campbell – The Funeral Chapel, New York, New York
- Funeraria San Vicente S.A., Medellin, Colombia

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- Gamble Funeral Service, Savannah, Georgia\*\*
  - Gardinier Funeral Home, Inc., Franklin, Pennsylvania\*\*
  - G.H. Hermann Funeral Homes, Indianapolis, Indiana
  - Gorsline Runciman Funeral Homes, Lansing, Michigan\*\*
  - Gunderson Funeral and Cremation Care, Madison, Wisconsin\*\*

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- Halbritter Wickens Funeral Service, Niles, Michigan
  - Haley McGinnis Funeral Home & Crematory, Owensboro, Kentucky\*
  - Halpin-Bitecola Brookdale Funeral Home, Bloomfield, New Jersey
  - Heath Funeral Chapel and Crematory, Lakeland, Florida
  - Henderson Funeral Home & Crematory, Pekin, Illinois\*\*
  - Heritage Funeral Home, Nipawin, Saskatchewan, Canada\*\*
  - Hightower Family Funeral Homes, Carrollton, Georgia
  - Howard K. Hill Funeral Services, New Haven, Connecticut
  - Hughes Family Tribute Center, Dallas, Texas

- 
- Inglesby & Sons Funeral Home, Pennsauken, New Jersey
  - James Funeral Home & Northlake



- Memorial Gardens, Huntersville, North Carolina
  - Jennings-Calvey Funeral and Cremation Services, Inc., Clarks Summit, Pennsylvania
  - Johnson-Hagglund Funeral and Cremation Service, Litchfield, Minnesota\*\*
  - Johnson-McBride Funeral Chapel, Glencoe, Minnesota
  - Jones-Wynn Funeral Homes & Crematory, Douglasville, Georgia\*\*
  - Jones-Wynn Funeral Homes & Crematory, Villa Rica, Georgia\*\*
  - Joseph Vertin and Sons Funeral Home, Breckenridge, Minnesota\*\*
- 
- Karrer-Simpson Funeral Home, Port Huron, Michigan
  - Kaul Funeral Home, Clinton Township, Michigan\*\*
  - Kemp Funeral Home & Cremation Services, Southfield, Michigan
  - Kerrville Funeral Home, Kerrville, Texas\*\*
  - Kimble Funeral Home, Junction, Texas
  - Krestridge Funeral Home, Levelland, Texas
- 
- Lakeshore Memorial Services, Holland, Michigan
  - Lakeside Memorial Funeral Home, Inc., Hamburg, New York
  - Lakeside Memorial Funeral Home, Inc., West Seneca, New York
  - Langley Funeral Home, Camp Hill, Alabama
  - Leo P. Gallagher & Son Funeral Home, Stamford, Connecticut
  - Lord and Stephens Funeral Home, Athens, Georgia
- 
- Macz Funeral Homes, Centralia, Illinois
  - Martin Funeral, Cremation & Tribute Services – Fairgrove, Fairgrove, Michigan\*\*
  - Martin Funeral, Cremation & Tribute Services – Grand Blanc, Grand Blanc, Michigan
  - Martin Funeral, Cremation & Tribute Services – Mt. Morris, Mt. Morris, Michigan\*\*
  - Martin Funeral, Cremation & Tribute Services – Vassar, Vassar, Michigan\*\*
  - Memorial Funeral Home – Edinburg, Edinburg, Texas\*\*
  - Memorial Funeral Home – San Juan, San Juan, Texas\*\*
  - Mercer-Adams Funeral Service, Bethany, Oklahoma
  - Miilani Memorial Park & Mortuary, Waipahu, Hawaii
- 
- Milward Funeral Directors, Lexington, Kentucky\*\*
  - Moments Funeral Home, Lucedale, Mississippi
  - Morada Da Paz, Paulista, Pernambuco, Brazil
  - Morgan & Nay Funeral Centre, Madison, Indiana
  - Morris-Baker Funeral Home and Cremation Services, Johnson City, Tennessee
  - Morrison Funeral Homes, Tusculumbia, Alabama
  - Morrissett Funeral & Cremation Service, North Chesterfield, Virginia
  - Mount Sinai Memorial Chapels, East Brunswick, New Jersey
  - Myers Mortuary – Brigham City, Brigham City, Utah\*\*
  - Myers Mortuary – Layton, Layton, Utah\*\*
  - Myers Mortuary – Ogden, Ogden, Utah\*\*
  - Myers Mortuary – Roy, Roy, Utah\*\*
- 
- Nie Family Funeral Home & Cremation Service, Ann Arbor, Michigan
- 
- Oakley-Cook Funeral Home & Crematory, Bristol, Tennessee
  - Old Bridge Funeral Home, Old Bridge, New Jersey
  - Oliverie Funeral Home, Manchester, New Jersey
- 
- Patrick T. Lanigan Funeral Home & Crematory, Inc., East Pittsburgh, Pennsylvania\*\*
  - Pedersen Funeral Home, Morris, Minnesota\*\*
  - Pixley Funeral Home, Rochester, Michigan\*\*
  - Posey Funeral Directors, North Augusta, South Carolina
  - Pray Funeral Home, Inc., Charlotte, Michigan\*\*
- 
- Radney Funeral Home, Alexander City, Alabama
  - Reeves Funeral Homes, Ltd., Coal City, Illinois\*\*
  - Reichmuth Funeral Home, Elkhorn, Nebraska
  - Resurrection Funeral Home, Clinton Township, Michigan
  - Reynolds Jonkhoff Funeral Home and Cremation Services, Traverse City, Michigan\*\*
  - Robinson Funeral Home – Downtown, Easley, South Carolina
  - Robinson Funeral Home – Powdersville Road, Easley, South Carolina\*
  - Roller-Alcoa Funeral Home, Benton, Arkansas
- 
- Roller-Chenal Funeral Home, Little Rock, Arkansas\*\*
  - Roller-Cox Funeral Home, Clarksville, Arkansas
  - Roller-Daniel Funeral Home, Searcy, Arkansas\*\*
  - Roller Funeral Home – Paris, Paris, Arkansas
  - Roller-McNutt Funeral Home – Clinton, Clinton, Arkansas
  - Roller-McNutt Funeral Home, Conway, Arkansas\*\*
  - Roller-Owens Funeral Home, North Little Rock, Arkansas\*\*
  - Roselawn Funeral Home, Princeton, West Virginia\*
- 
- Seaver Brown Funeral Service & Crematory, Marion, Virginia
  - Sheldon-Kukuchka Funeral Home, Inc., Tunkhannock, Pennsylvania
  - Smith-North Little Rock Funeral Home, North Little Rock, Arkansas
  - Spicer-Mullikin Funeral Homes & Crematory, New Castle, Delaware
  - St. Peter Chapels, Quezon City, Philippines
- 
- Tetrick Funeral Services, Johnson City, Tennessee
  - Thomas McAfee Funeral Home – Downtown Chapel, Greenville, South Carolina\*\*
  - Thomas McAfee Funeral Home – Northwest Chapel, Greenville, South Carolina\*\*
  - Thomas McAfee Funeral Homes – Southeast Chapel, Simpsonville, South Carolina
  - Twiford Funeral Home, Elizabeth City, North Carolina\*\*
- 
- Valley View Memorial Park and Funeral Home, West Valley City, Utah
  - Vertin-Munson Funeral Home and Cremation Service, Wahpeton, North Dakota
- 
- Wasatch Lawn Memorial Park and Mortuary, Salt Lake City, Utah
  - Weeks' Dryer Mortuary, Tacoma, Washington
  - Weeks' Enumclaw Funeral Home, Enumclaw, Washington\*\*
  - Weeks' Funeral Home, Buckley, Washington\*\*
  - Wieting Family Funeral Home, Chilton, Wisconsin
  - Wm. Sullivan & Son Funeral Home, Utica, Michigan\*\*
  - Worlein Funeral Home, Austin, Minnesota\*\*

## Plan to Buy StoneMor and Take It Private Falls Through

**TREVOSE, PENNSYLVANIA** – Axar Capital Management canceled its proposal to acquire all of the outstanding shares of common stock of StoneMor, Inc., after determining it will not be able to reach a satisfactory agreement with the company. StoneMor owns and operates 319 cemeteries and 88 funeral homes in 27 states and Puerto Rico.

StoneMor received an unsolicited proposal letter dated May 24, 2020, from Axar proposing to acquire all of the company's outstanding shares of common stock not owned by Axar or its affiliates in a "going private" transaction. Axar currently owns approximately 52% of StoneMor's outstanding common stock.

"We have worked closely with Axar over the last six weeks to evaluate its most recent proposal. We have consulted with our financial and legal advisors throughout the process," said Stephen J. Negrotti, chair of the special committee of the StoneMor board of directors, in a press release. "Despite these efforts, there remained a substantial difference regarding the valuation of the company."

In an unrelated announcement, StoneMor disclosed that its board voted unanimously to submit two proposals to company stockholders at its 2020 annual meeting of stockholders to amend its certificate of incorporation. The first proposal would effect a reverse split of the company's common stock at a ratio of 1-for-10 in the event that the board deems such action advisable to avoid delisting on the New York Stock Exchange, or otherwise in the best interests of the company and its stockholders at the time.

As previously reported, StoneMor received notice from the New York Stock Exchange in April 2020 that it was not in compliance with the NYSE's minimum price continued-listing requirements. In order to regain compliance, the closing price of the company's common stock on December 24, 2020, and the average closing price for the 30

trading days ending on that date must be at least \$1. The company also would regain compliance if the closing price of the common stock on the last trading day of any month, and the average closing price for the 30 trading days ending on that date, is at least \$1.00.

The second proposal would declassify the StoneMor board and provide for annual elections for all directors. Currently, the company's board is divided into three classes, with the members of each class serving staggered three-year terms. If the stockholders approve the proposal, each director will resign upon the effectiveness of the amendment and immediately be reappointed to the board to serve until the company's 2021 annual meeting. Beginning at that meeting, all directors will stand for election annually.

The proposals to amend the company's certificate of incorporation will be detailed in the company's proxy statement, which will be filed and disseminated to stockholders in advance of the annual meeting, which will be held November 5, 2020.

### **PATRICK ELECTED TO BOARD**

StoneMor also announced that it increased the size of its board to eight directors with the election of Kevin D. Patrick filling the new position. Patrick has been senior vice president, chief financial officer and treasurer of Colonial Williamsburg Foundation since August 2017. In this capacity, he is responsible for all financial aspects of the operation of the foundation, which has assets of approximately \$1 billion, including an endowment of approximately \$700 million, annual revenues in excess of \$200 million, and approximately \$337 million in outstanding debt. Patrick holds an MBA from the University of Connecticut and a BBA in finance from Connecticut State University's Ansell School of Business.

## The Notebook

**FUNERAL DIRECTORS LIFE** named Michelle Morgan market center manager for East Texas. Before transitioning into her new role, Morgan spent the last three years in sales for CLAIMCHECK, an insurance-assignment company, where she gained a strong background in the sales, insurance and customer-service industries. Morgan received her bachelor's degree from Texas A&M – Commerce, where she majored in animal science/business management. Since then, she has developed her skills as a sales and customer-service professional, working diligently to provide sales support, oversee business relationships with current and future customers, and ensure clients receive the attention and care they need to see success.

Funeral Directors Life also named Jarrett Wilson an active sales manager for Ohio. As a fifth-generation funeral professional, Wilson received his bachelor's degree in communications from Ohio State University. Additionally, he is a licensed funeral director and Ohio life-insurance agent with more than 24 years of sales experience – including time serving as a funeral director, general manager, and funeral home co-owner.

“Little Free Libraries” are a global phenomenon. The small, front-yard book exchanges number 36,000 around the world in 70 countries – from Iceland to Tasmania to Pakistan. Now, a new Little Free Library at **CARPINO FUNERAL HOME** in Southbury, Connecticut, will join the movement to share books, bring people together and create communities of readers. “Our Little Free Library doesn't just belong to us, it belongs to the whole community,” says Matt Bailey, president of CT Life Tributes, of which Carpino Funeral Home is part. “We are living during interesting times. It's our hope that this Little Free Library will bring a little more joy, a little more connection, and a whole lot of love for reading to our friends and neighbors.” The Little Free Library nonprofit organization has been honored by the Library of Congress, the National Book Foundation, and the American Library Association. In addition, Reader's Digest named them one of the “50 Surprising Things We Love About America.” Each year, nearly 10 million books are shared in Little Free Libraries. To learn more, visit [littlefreelibrary.org](http://littlefreelibrary.org).



*Funeral directors Jayson Dahlgard (left) and Matt Bailey stand by the new Little Free Library at Carpino Funeral Home in Southbury.*

**THACKER CASKETS** announced the retirement of Sandy Saucier and Lounell Badgett after many years of dedicated service. This year marked Saucier's 40th year with Thacker Caskets, where she was an integral part of making sure the business continued to run fluidly during various new-business ventures, including many of the early acquisitions and building the manufacturing plant in Alabama. Badgett celebrated her 34th year with Thacker Caskets this year. Thacker Caskets offered its sincere thanks to Saucier and Badgett for their loyalty throughout the years.

**MBJ**

# From the Editor's Desk...

## 19 Years

This week, social media was buzzing with memories, tributes, prayers and photographs recalling the tragic events of September 11, 2001. Nineteen years is not a long time, and the emotions of many are indeed still raw. A friend of mine told me years ago he would never want to see video of the planes hitting the towers. I believe he has kept that vow and, every year, the flag flies high in front of his house.

Prior to the Labor Day weekend, I was reading a local newspaper article that surveyed area residents as to their plans to acknowledge the coming anniversary of the 9/11 attacks. The results found that 30% of those surveyed think about 9/11 on a regular basis, while another 46% do so from time to time. Some 14% said they planned to attend a public ceremony marking the anniversary of the attacks; 12% planned to commemorate the date in private; and 4% didn't know what they would do. But 70% said they'd do nothing out of the ordinary.

The results were surprising to me because the survey took place in New Jersey, an area where a number of those killed on September 11 lived. In casual conversation with friends and neighbors, I asked a similar question and received similar replies. When I asked why they would do nothing out of the ordinary, the common response was that they didn't know what to do outside of watching coverage on TV. My local weekly paper did note that, as usual, a ceremony would take place in the town center, but with a new twist in accordance with the times – the crowd size would be monitored and masks were required.

Significant anniversaries are ideal opportunities for funeral homes and cemeteries to become hubs in the community to mark such events – even with an ad in a community newspaper or a social-media post. While local governments might mean well, these events sometimes come off as photo ops for local pols.

I read a comment in one paper from a man not directly affected by 9/11. He paused to reflect on the death of a parent and said he buried his parent without a funeral or memorial. Seeing the 9/11 memorials made him admit that he had made a mistake and that not having that service denied him closure of his parent's death.

It's easy to take memorialization for granted because it's not something a lot of people think about until they have to, and then they're often unprepared.

All in all, it was a very impressive week. The September 11 memorials continually remind us that the human spirit is often at its best when things are at their worst. Next year will mark the 20th anniversary, a milestone number. In some ways it feels like only last month, but sometimes as if it was 100 years ago.

 **EDWARD J. DEFORT**  
**EDITOR**

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