


BUSINESS PLAN [YEAR]




Funeral Home

Funerals, cremations, & tribute services.

 **John Doe**

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Information provided in this business plan is unique to this business and confidential; therefore, anyone reading this plan agrees not to disclose any of the information in this business plan without prior written permission of the company.

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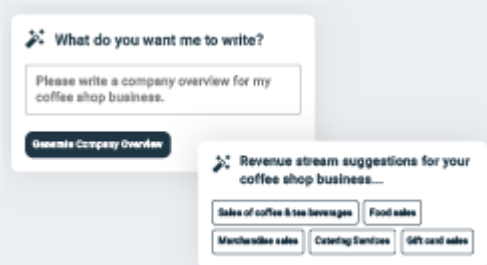
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1.

Executive Summary

Mission Statement

Vision Statement

Keys to Success

Financial Summary



REMEMBER

Before you think about how to start a Funeral Homes service, you must create a detailed Funeral Homes business plan. It will not only guide you in the initial phases of your startup but will also help y

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John's Funeral Homes

John's Funeral Homes is a registered and licensed funeral home business that will be located in the heart of Cape May - New Jersey in a neatly renovated and secured housing facility; a facility that is specifically designed and equipped with the needed facility for

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Mission Statement

John's Funeral Homes

The mission of John's Funeral Homes is to bring people together to celebrate life when it ends and to move on with living. The Center will have facilities that bring families and communities together to remember the life of the deceased and renew bonds of so

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Vision Statement

John's Funeral Homes

- Our vision is to establish a funeral home brand that will become the number one choice for residents in the whole of Cape May – New Jersey and other cities in the United

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Keys to Success

John's Funeral Homes

Since 71 percent of people choose a funeral home on the basis of reputation, the key to success is quickly establishing a reputation for this new category as the uplifting place for Baby Boomers to celebrate life when they die.

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Financial Summary

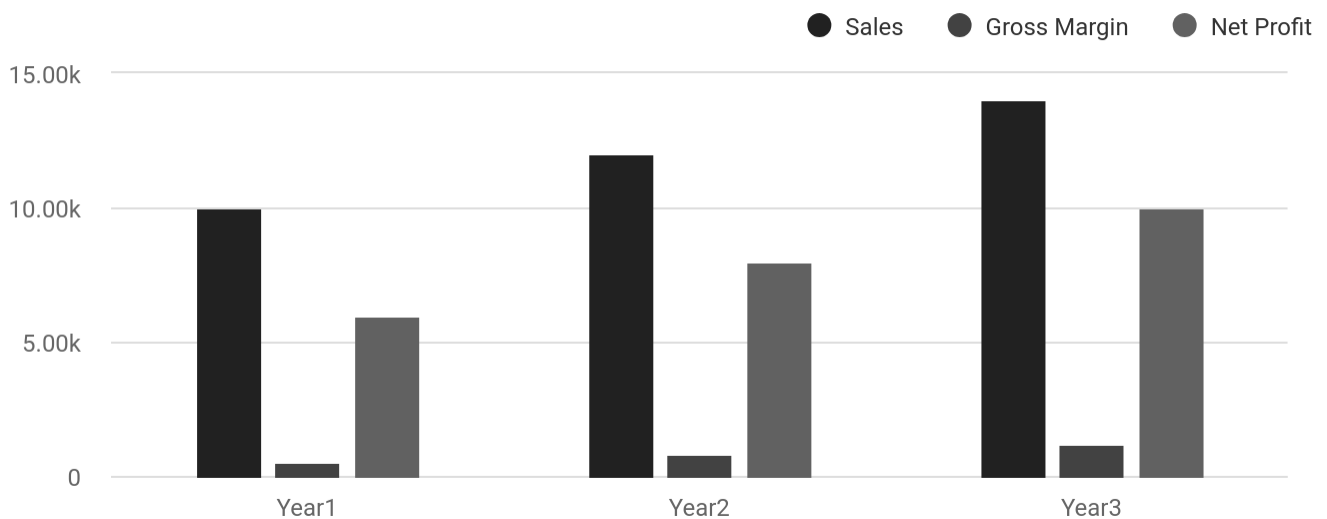
John's Funeral Homes

With the establishment of the Clarion Call Center, those who lose someone to death will for the first time in our era be integrated into the community of life instead of stigmatized and marginalized. There will be a new center for community involvement.

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3 Year profit forecast



Financial Summary

Year 1

Year 2

Year 3

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2.

Company Summary

Startup Summary

John's Funeral Homes

John's Funeral Homes is a family business that is owned and managed by John Moore and his family. Mr. John has a College degree in Mortuary Science and a Master's Degree in Business Administration. He has well over 15 years of experience working in the industry.

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Startup Summary

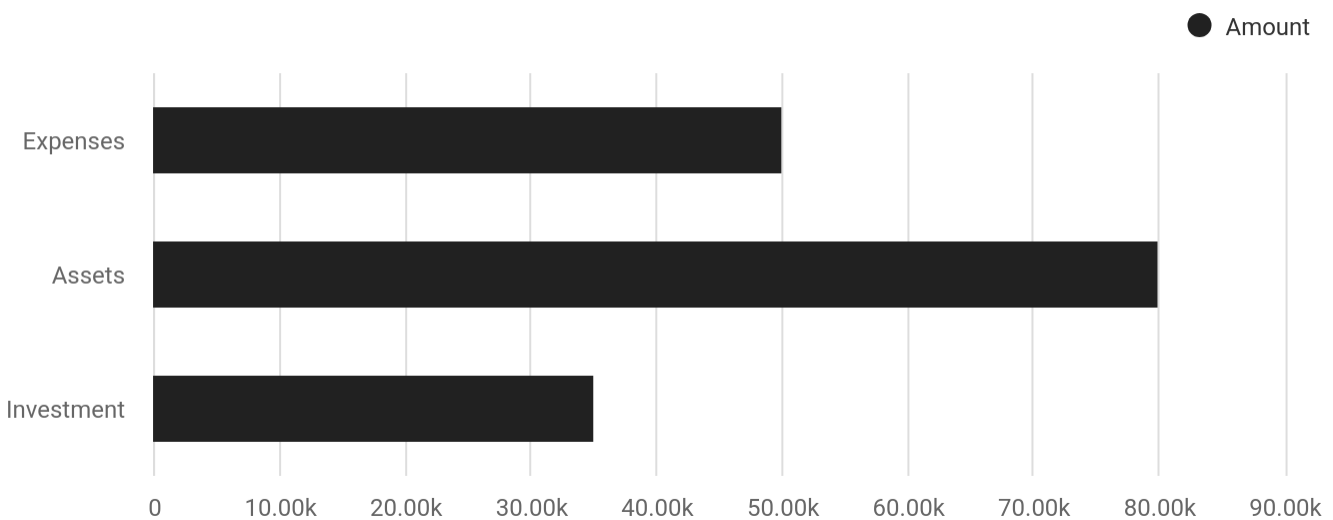
John's Funeral Homes

Total start-up capital and expenses (including legal costs, logo design, stationery, and related expenses) came to approximately \$41,700. Start-up assets required and utilized included brewing plants and machinery, pick-ups, office furniture, personal computers, and other equipment.

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Startup cost



Cost distribution

Amount

Expenses	50,000
Assets	80,000
Investment	35,000

Start-up Expenses	Amount
Legal	\$75,500
Consultants	\$0
Insurance	\$62,750
Rent	\$22,500
Research and Development	\$42,750
Expensed Equipment	\$42,750
Signs	\$1,250
TOTAL START-UP EXPENSES	\$247,500
Start-up Assets	\$0
Cash Required	\$322,500
Start-up Inventory	\$52,625
Other Current Assets	\$222,500
Long-term Assets	\$125,000
TOTAL ASSETS	\$121,875
Total Requirements	\$245,000
START-UP FUNDING	\$0
START-UP FUNDING	\$273,125
Start-up Expenses to Fund	\$121,875
Start-up Assets to Fund	\$195,000
TOTAL FUNDING REQUIRED	\$0
Assets	\$203,125
Non-cash Assets from Start-up	\$118,750
Cash Requirements from Start-up	\$0
Additional Cash Raised	\$118,750
Cash Balance on Starting Date	\$121,875
TOTAL ASSETS	\$0
Liabilities and Capital	\$0
Liabilities	\$0

Start-up Expenses	Amount
Current Borrowing	\$0
Long-term Liabilities	\$0
Accounts Payable (Outstanding Bills)	\$0
Other Current Liabilities (interest-free)	\$0
TOTAL LIABILITIES	\$0
Capital	\$0
Planned Investment	\$0
Investor 1	\$312,500
Investor 2	\$0
Other	\$0
Additional Investment Requirement	\$0
TOTAL PLANNED INVESTMENT	\$695,000
Loss at Start-up (Start-up Expenses)	\$313,125
TOTAL CAPITAL	\$221,875
TOTAL CAPITAL AND LIABILITIES	\$221,875
Total Funding	\$265,000

3.

Products and Services

Services

John's Funeral Homes

John's Funeral Homes is set to operate a standard funeral homes service in Cape May, New Jersey. The fact that we want to become a force to reckon with in the funeral home services industry means that we will go all the way out to give our clients a last

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Services



Funeral Planning

Our primary service will be providing funeral plans. These days, many people have started to purchase funeral plans. So that their families don't have to stress over their funeral charges after their death. In this service, we'll also be responsible for informing all the friends/ relatives of the deceased about the death.



Body Preparation

We will prepare the dead body to be buried or cremated. This service will include all the relevant tasks such as bathing the deceased, enshrouding, etc. The paperwork required for burial will also be completed by us.



Burial/ Cremation

We will provide space for performing eulogies and brief prayers for the dead. Moreover, we'll also be responsible for burying the dead body. Since in some religions, there is a ritual of cremating the deceased. Thus we'll be offering cremation services too.



Transportation

We'll also transport dead bodies from one place to another in specialized refrigerated vehicles.

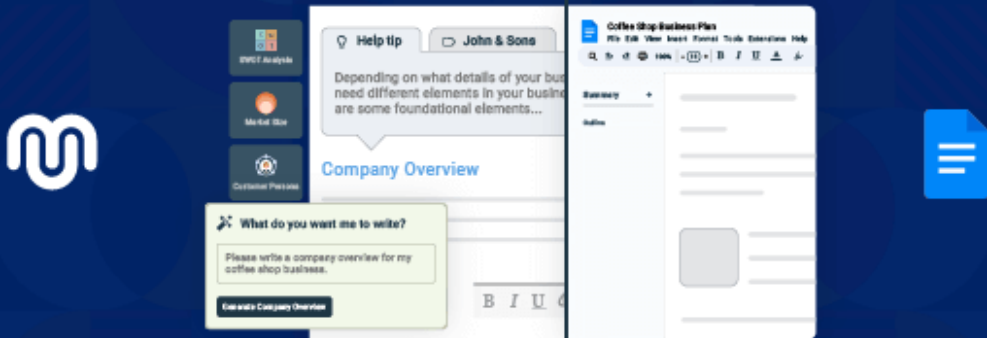


Catered Meal

We'll offer plated dinner to the mourners in a location other than our funeral home. Since funeral homes are generally prohibited to offer food in the same building, we decided to offer it in another building located nearby.

Upmetrics vs Business Plan Templates

You have a unique business with a distinct vision, and your business plan must reflect that. Although it won't be possible with generic templates.



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4.

Market Analysis

Market Trends

Target Market

Market Segmentation



REMEMBER

The most important component of an effective Funeral Homes business plan is its accurate marketing analysis. If you are starting on a smaller scale, you can do marketing analysis yourself by taking help from

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Market Trends

John's Funeral Homes

All over the globe, people die every now and then and that is one of the reasons why the funeral business will continue to soar higher. It is trendy to find funeral homes in the United States of America and in most parts of the world operate standard and full opti

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Target Market

John's Funeral Homes

We look forward to dealing with those that we plan to focus on in this trade. It will be safe to say that the target market for funeral home services cuts across people of all class, race, religion, and culture as long as they value their deceased loved ones a

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Market Segmentation

John's Funeral Homes

The market is divided according to those who make the purchasing decisions regarding funerals. The market segments for the Center are divided by the generations of decision-makers over age 30.

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John's Funeral Homes

This is the age segment probably most marketed by existing funeral homes. Its mortality rate is 2 percent per year, and it's the generation that generally has the most money. It has been called the Silent Generation because it was sandwiched between the heroic

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The GI Generation (born 1901-1924)

Start writing here..

John's Funeral Homes

(The post World War II "baby boom generation" born 1946 through 1964.) Members of this generation are increasingly involved in funeral decisions as their parents, spouses or children die. This age cohort is currently aged 39-57, as of 2003, and comprise

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The Silent Generation

Start writing here..

John's Funeral Homes

(1965-1980) This is the youngest cohort to make funeral decisions, with only members of this generation age 30 or older included as a market segment. Generation X members over the age of 30 comprise only 7.9 percent of Lane County, its mortality rate is low


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Boomers

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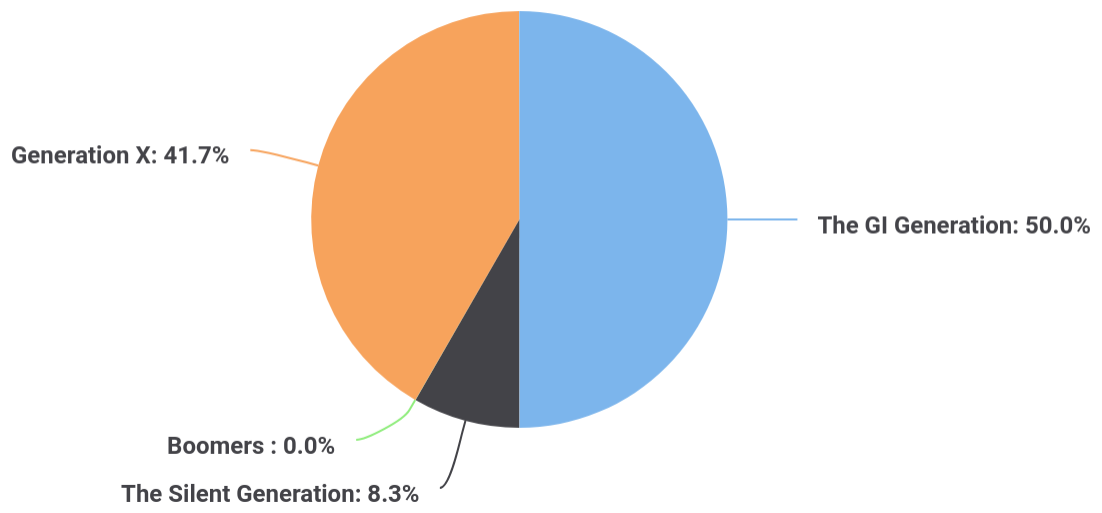
John's Funeral Homes

This generation is age 79 or older as of 2003. This is the most active market. Its mortality rate is about 12 percent per year but it makes up only 3.9 percent of Lane County. Because the rate of dementia is high among this group, if funeral arrangements haven't

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Generation X

Start writing here..



5.

Strategy & Implementations

Marketing Strategies

Sales Strategy

Milestones



REMEMBER

After identifying the market demand, market trends, and the potential customers of the startup, the next step is to define an effective strategy for attracting those customers. Like marketing analysis

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Marketing Strategies

John's Funeral Homes

Advert and marketing are one of the backbones of all businesses. It is also the backbone of ours because we know that if we are able to get the right words out there, people will come for us. John's Funeral Homes is in the funeral home business to make a p

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Sales Strategy

John's Funeral Homes

Sales will be accomplished through implementing the sales process and the employment of a full-time sales professional in year three. During the first two years, the sales process will be implemented by the owner who will document procedures and training

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Milestones

John's Funeral Homes

The following table lists important program milestones, with dates and managers in charge, and budgets for each. The milestone schedule indicates our emphasis on planning for implementation. The most important programs are nonprofit activities

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6.

Management Summary

Personnel Plan

Milestones

John's Funeral Homes

The Center's management is composed of an experienced funeral director and embalmer who has been active in the management of funeral homes for 10 years.

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Personnel Plan

John's Funeral Homes

The personnel plan is as follows:

- The owner will be the funeral director, embalmer, and cremator. During the first two years

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Milestones

John's Funeral Homes

Personnel Plan

Year1

Year2

Year3

Year4

Year5

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7.

Financial Plan

Important Assumptions

Break-even Analysis

Projected Profit and Loss

Projected Cash Flow

Projected Balance Sheet

Business Ratios



REMEMBER

The last component of a Funeral Homes business plan is an in-depth financial plan. The financial plan crafts a detailed map of all the expenses needed for the startup and how these expenses will

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John's Funeral Homes

The company will be financed by John himself and he will control the direction of the business to make sure that it is expanding at the forecasted rate. As for the Funeral Homes business start-up, no equity funding or outside loans will be required. With the h

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Important Assumptions

The financial projections of the company are forecast on the basis of the following assumptions. These assumptions are quite conservative and are expected to show deviation but to a limited level such that the company's major financial strategy will not be affected.

	Year 1	Year 2	Year 3
Plan Month	1	2	3
Current Interest Rate	10,00%	11,00%	12,00%
Long-term Interest Rate	10,00%	10,00%	10,00%
Tax Rate	26,42%	27,76%	28,12%
Other	0	0	0

Brake-even Analysis

Monthly Units Break-even	5530
Monthly Revenue Break-even	\$159 740
Assumptions:	
Average Per-Unit Revenue	\$260,87
Average Per-Unit Variable Cost	\$0,89
Estimated Monthly Fixed Cost	\$196 410

Projected Profit and Loss

	2024	2025	2026
Revenue	\$768,000	\$792,912	\$889,027
Basic Funeral Services	\$216,000	\$226,152	\$254,628
Unit Sales	180	188	212
Unit Price	\$1,200	\$1,200	\$1,200
Cremation Services	\$240,000	\$247,350	\$277,380
Unit Sales	240	247	277
Unit Price	\$1,000	\$1,000	\$1,000
Pre-Planning Services	\$312,000	\$319,410	\$357,019
Unit Sales	240	246	275
Unit Price	\$1,300	\$1,300	\$1,300
Cost Of Sales	\$39,830	\$40,984	\$42,218.48
General Costs	\$39,830	\$40,984	\$42,218.48
Funeral Service Supplies	\$26,430	\$27,048	\$27,725.04
Casket Purchase	\$14,400	\$14,688	\$14,994.24
Embalming Supplies	\$12,030	\$12,360	\$12,730.80
Cremation Services	\$13,400	\$13,936	\$14,493.44
Cremation Consumables	\$8,400	\$8,736	\$9,085.44
Cremation Equipment Maintenance	\$5,000	\$5,200	\$5,408
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$728,170	\$751,928	\$846,808.52

	2024	2025	2026
Gross Margin (%)	94.81%	94.83%	95.25%
Operating Expense	\$684,219.99	\$709,032.45	\$735,721.33
Payroll Expense (Indirect Labor)	\$609,984	\$626,424.48	\$643,335.36
Management	\$90,000	\$92,700	\$95,481
General Manager	\$90,000	\$92,700	\$95,481
Funeral Services Staff	\$262,080	\$270,662.40	\$279,531
Funeral Director	\$72,000	\$74,880	\$77,875.20
Embalmer	\$190,080	\$195,782.40	\$201,655.80
Administrative and Support Staff	\$257,904	\$263,062.08	\$268,323.36
Receptionist	\$48,144	\$49,106.88	\$50,088.96
Maintenance Worker	\$209,760	\$213,955.20	\$218,234.40
General Expense	\$74,235.99	\$82,607.97	\$92,385.97
Facility Expenses	\$36,094.75	\$43,038.63	\$51,406.45
Utility Bills	\$25,364.99	\$29,430.82	\$34,148.44
Property Maintenance	\$10,729.76	\$13,607.81	\$17,258.01
Administrative Expenses	\$21,341.24	\$22,145.34	\$23,051.52
Office Supplies	\$6,341.24	\$7,145.34	\$8,051.52
Insurance	\$15,000	\$15,000	\$15,000
Marketing and Advertising	\$16,800	\$17,424	\$17,928
Digital Marketing	\$9,600	\$10,080	\$10,584
Print Advertising	\$7,200	\$7,344	\$7,344
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0

	2024	2025	2026
EBITDA	\$43,950.01	\$42,895.55	\$111,087.19
Additional Expense	\$30,935.05	\$29,844.56	\$28,686.82
Long Term Depreciation	\$25,416	\$25,416	\$25,416
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	\$18,534.01	\$17,479.55	\$85,671.19
Interest Expense	\$5,519.05	\$4,428.56	\$3,270.82
EBT	\$13,014.96	\$13,050.99	\$82,400.37
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$754,985.04	\$779,861.01	\$806,626.63
Net Income	\$13,014.96	\$13,050.99	\$82,400.37
Net Income (%)	1.69%	1.65%	9.27%
Retained Earning Opening	\$0	(\$36,985.04)	(\$73,934.05)
Owner's Distribution	\$50,000	\$50,000	\$40,000
Retained Earning Closing	(\$36,985.04)	(\$73,934.05)	(\$31,533.68)

Projected Cash Flow

	2024	2025	2026
Cash Received	\$768,000	\$792,912	\$889,027
Cash Paid	\$729,569.04	\$754,445.01	\$781,210.63

	2024	2025	2026
COS & General Expenses	\$114,065.99	\$123,591.97	\$134,604.45
Salary & Wages	\$609,984	\$626,424.48	\$643,335.36
Interest	\$5,519.05	\$4,428.56	\$3,270.82
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	\$38,430.96	\$38,466.99	\$107,816.37
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$560,000	\$0	\$0
Net Cash From Investments	(\$560,000)	\$0	\$0
Amount Received	\$150,000	\$0	\$0
Loan Received	\$100,000	\$0	\$0
Common Stock	\$50,000	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Amount Paid	\$67,680.31	\$68,770.80	\$59,928.54
Loan Capital	\$17,680.31	\$18,770.80	\$19,928.54
Dividends & Distributions	\$50,000	\$50,000	\$40,000
Net Cash From Financing	\$82,319.69	(\$68,770.80)	(\$59,928.54)
Summary			
Starting Cash	\$0	(\$439,249.35)	(\$469,553.16)
Cash In	\$918,000	\$792,912	\$889,027

	2024	2025	2026
Cash Out	\$1,357,249.35	\$823,215.81	\$841,139.17
Change in Cash	(\$439,249.35)	(\$30,303.81)	\$47,887.83
Ending Cash	(\$439,249.35)	(\$469,553.16)	(\$421,665.33)

Projected Balance Sheet

	2024	2025	2026
Assets	\$95,334.65	\$39,614.84	\$62,086.67
Current Assets	(\$439,249.35)	(\$469,553.16)	(\$421,665.33)
Cash	(\$439,249.35)	(\$469,553.16)	(\$421,665.33)
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$534,584	\$509,168	\$483,752
Gross Long Term Assets	\$560,000	\$560,000	\$560,000
Accumulated Depreciation	(\$25,416)	(\$50,832)	(\$76,248)
Liabilities & Equity	\$95,334.65	\$39,614.84	\$62,086.67
Liabilities	\$82,319.69	\$63,548.89	\$43,620.35
Current Liabilities	\$18,770.80	\$19,928.54	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$18,770.80	\$19,928.54	\$0
Long Term Liabilities	\$63,548.89	\$43,620.35	\$43,620.35
Long Term Debt	\$63,548.89	\$43,620.35	\$43,620.35

	2024	2025	2026
Equity	\$13,014.96	(\$23,934.05)	\$18,466.32
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$50,000	\$50,000	\$50,000
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Retained Earnings	(\$36,985.04)	(\$73,934.05)	(\$31,533.68)
Check	\$0	\$0	\$0

Business Ratios

	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%
Percent of Total Assets				
Accounts Receivable	5,61%	4,71%	3,81%	9,70%
Inventory	1,85%	1,82%	1,79%	9,80%
Other Current Assets	1,75%	2,02%	2,29%	27,40%
Total Current Assets	138,53%	150,99%	163,45%	54,60%
Long-term Assets	-9,47%	-21,01%	-32,55%	58,40%
TOTAL ASSETS	100,00%	100,00%	100,00%	100,00%
Current Liabilities	4,68%	3,04%	2,76%	27,30%
Long-term Liabilities	0,00%	0,00%	0,00%	25,80%
Total Liabilities	4,68%	3,04%	2,76%	54,10%
NET WORTH	99,32%	101,04%	102,76%	44,90%
Percent of Sales				
Sales	100,00%	100,00%	100,00%	100,00%
Gross Margin	94,18%	93,85%	93,52%	0,00%

	Year 1	Year 2	Year 3	Industry Profile
Selling, General & Administrative Expenses	74,29%	71,83%	69,37%	65,20%
Advertising Expenses	2,06%	1,11%	0,28%	1,40%
Profit Before Interest and Taxes	26,47%	29,30%	32,13%	2,86%
Main Ratios				
Current	25,86	29,39	32,92	1,63
Quick	25,4	28,88	32,36	0,84
Total Debt to Total Assets	2,68%	1,04%	0,76%	67,10%
Pre-tax Return on Net Worth	66,83%	71,26%	75,69%	4,40%
Pre-tax Return on Assets	64,88%	69,75%	74,62%	9,00%
Additional Ratios				
Net Profit Margin	19,20%	21,16%	23,12%	N.A.
Return on Equity	47,79%	50,53%	53,27%	N.A.
Activity Ratios				
Accounts Receivable Turnover	4,56	4,56	4,56	N.A.
Collection Days	92	99	106	N.A.
Inventory Turnover	19,7	22,55	25,4	N.A.
Accounts Payable Turnover	14,17	14,67	15,17	N.A.
Payment Days	27	27	27	N.A.
Total Asset Turnover	1,84	1,55	1,26	N.A.
Debt Ratios				
Debt to Net Worth	0	-0,02	-0,04	N.A.
Current Liab. to Liab.	1	1	1	N.A.
Liquidity Ratios				
Net Working Capital	\$120 943	\$140 664	\$160 385	N.A.
Interest Coverage	0	0	0	N.A.
Additional Ratios				
Assets to Sales	0,45	0,48	0,51	N.A.
Current Debt/Total Assets	4%	3%	2%	N.A.

	Year 1	Year 2	Year 3	Industry Profile
Acid Test	23,66	27,01	30,36	N.A.
Sales/Net Worth	1,68	1,29	0,9	N.A.
Dividend Payout	0	0	0	N.A.

Upmetrics vs Financial Spreadsheets

Spreadsheets can be a powerful tool for preparing complex financial reports and forecasts. However, using them can be quite time-consuming, intimidating, and frustrating.

The image shows two side-by-side views of financial planning software. On the left is the Upmetrics interface, which features a clean, modern design with a sidebar containing icons for 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The main area displays a 'Financial Plan' with a 'Profit & Loss' table for the year 2023-04. The table has columns for '2023-04' and '2024-03'. The rows include Revenue, Cost of Sales, Gross Margin, Gross Margin (%), and Operating Expenses. Below the table is a calculator titled 'What price will you charge for each unit?' with a 'Constant Assesst' button and a 'Varying amounts over time' button. The current input is '\$ 40 Per Unit'. On the right is a standard spreadsheet interface with a grid and various toolbars. A green document icon with a grid pattern is positioned between the two interfaces.

Upmetrics could be your way out of boring & clumsy spreadsheets. Simply enter the numbers, and get accurate and easy-to-understand financial reports made in minutes - no more remembering complex formulas or fussing in the spreadsheet.

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Mariia Yevlash



Student, Sumy State University – Ukraine

The most helpful feature was to make a business plan out of a simple idea. Thankful for all the tools provided, **especially AI which did a great impact on my work.**

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