


# BUSINESS PLAN [YEAR]




## Funeral Home

Funerals, cremations, & tribute services.

 John Doe

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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 you later on.

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**TIP**

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 a world-class funeral home services.

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## Mission Statement



**TIP**

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 social support. The Center's facilities will be a focus of nonprofit energies to make the community a better place.

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## Vision Statement



**TIP**

- 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 States.
- Our vision reflects our values: integrity, service, and compassion.

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## Keys to Success



**TIP**

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.

The Center's cornerstone will be its reception facilities

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## Financial Summary



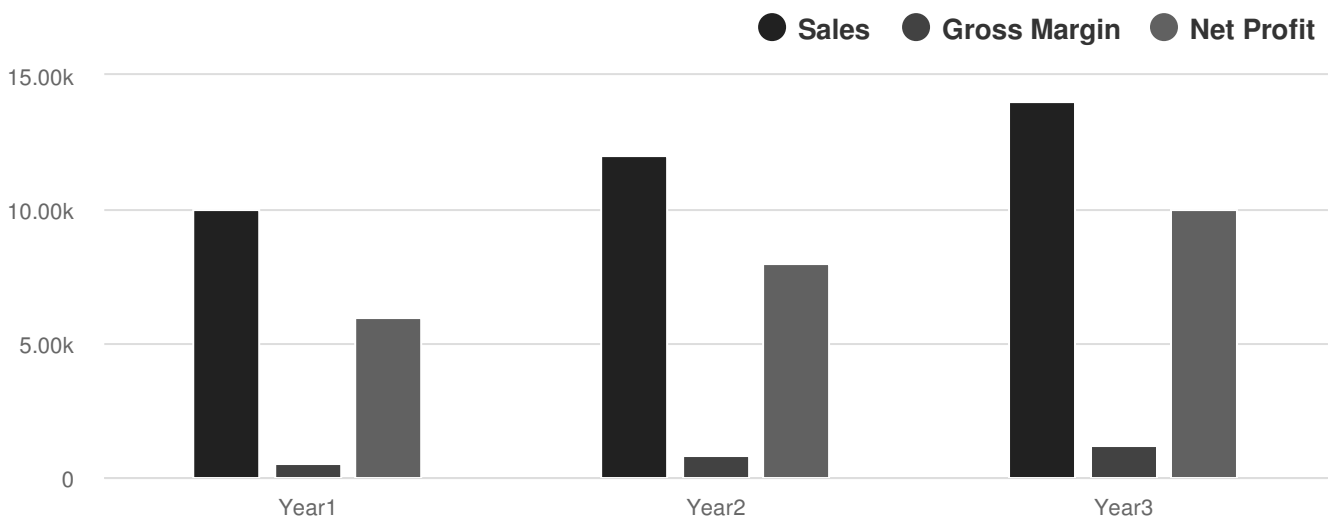
**TIP**

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. And for the first time, the Boomer generation will be able to go out the way it lived.

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## 3 Year profit forecast





**TIP**

Financial Summary	Year 1	Year 2	Year 3
Revenue	\$965,742	\$1,878,611	\$2,718,300

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# 2.

## Company Summary

Startup Summary



TIP

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 Funeral Homes Services industry both at the state and national level.

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## Startup Summary



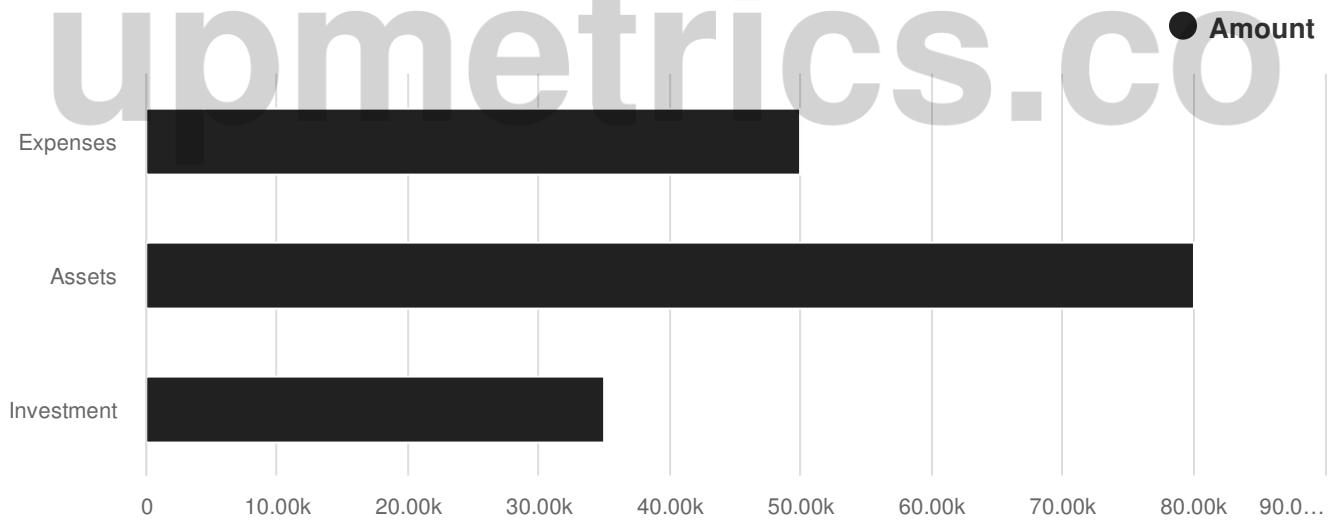
TIP

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 office equipment. This figure comes to \$840,000.

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## Startup cost



### Cost distribution

### Amount

Expenses

50000

Assets

80000

Investment

35000

<b>Start-up Expenses</b>	<b>Amount</b>
Legal	\$75,500
Consultants	\$0
Insurance	\$62,750
Rent	\$22,500
Research and Development	\$42,750
Expensed Equipment	\$42,750
Signs	\$1,250
<b>TOTAL START-UP EXPENSES</b>	<b>\$247,500</b>
Start-up Assets	\$0
Cash Required	\$322,500
Start-up Inventory	\$52,625
Other Current Assets	\$222,500
Long-term Assets	\$125,000
<b>TOTAL ASSETS</b>	<b>\$121,875</b>
Total Requirements	\$245,000
<b>START-UP FUNDING</b>	<b>\$0</b>
<b>START-UP FUNDING</b>	<b>\$273,125</b>
Start-up Expenses to Fund	\$121,875
Start-up Assets to Fund	\$195,000
<b>TOTAL FUNDING REQUIRED</b>	<b>\$0</b>
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
<b>TOTAL ASSETS</b>	<b>\$0</b>
Liabilities and Capital	\$0
Liabilities	\$0
Current Borrowing	\$0

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

# 3.

## Products and Services



**TIP**

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 lasting and pleasant memory of their bereaved family members and friends.

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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.

# 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 this Funeral Homes business plan sample or other Funeral Homes business plans available online.

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## Market Trends



### TIP

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 option services.

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## Target Market



### TIP

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 and would want to give them befitting burial or cremation as required.

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## Market Segmentation



### TIP

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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TIP

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 GI Generation that fought World War II (now sometimes called "The Greatest Generation," and th

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## The GI Generation (born 1901-1924)

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TIP

(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 comprises 27.2 percent of the Eugene-Springfield MSA, and over half of the demographic, that makes funeral de

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## The Silent Generation

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TIP

(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 and it probably has the least input into the decisions about funerals. This generation challenge

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## Boomers

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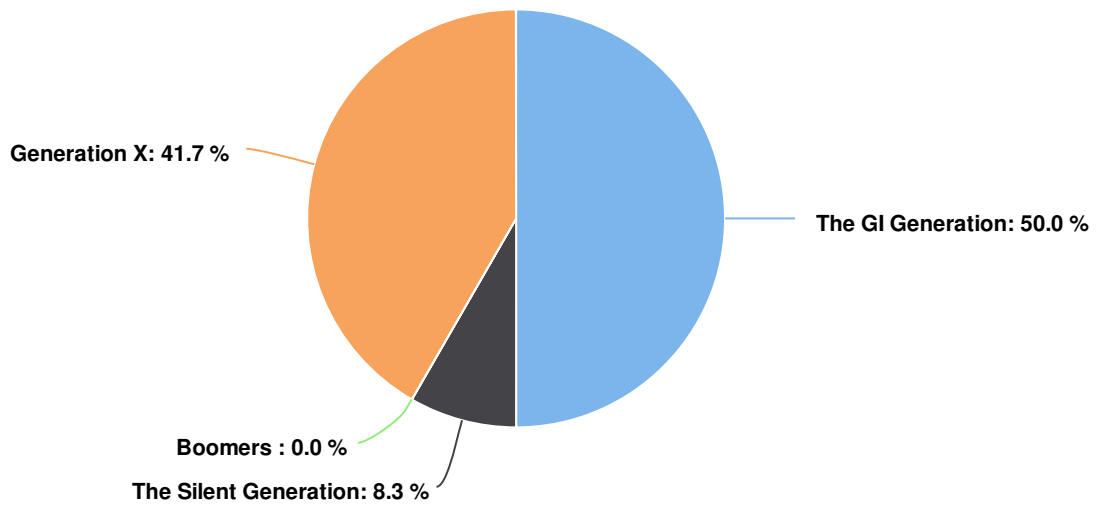
TIP

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 been pre-arranged, it's likely their Baby Boomer children are making the arrangements.

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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, sales strategy is also an important component of a Funeral Homes business startup and must be properly planned before you think about starting your business.

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## Marketing Strategies



**TIP**

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 profit and we can only make a profit if we steadily increase our customer base.

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## Sales Strategy



**TIP**

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 manuals.

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## Milestones



**TIP**

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 to quickly establish our reputation as part of the community. These efforts were described in detail in our business plan.

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# 6.

## Management Summary

Personnel Plan

Milestones



TIP

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.

A policy manual and job descriptions have been dev

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## Personnel Plan



TIP

The personnel plan is as follows:

- The owner will be the funeral director, embalmer, and cremator. During the first two years, he will also serve as a sales representative. His needs are \$60,000 per year. After the first

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## Milestones



TIP

Personnel Plan	Year1	Year2	Year3	Year4	Year5
Owner	\$60,000	\$61,800	\$63,654		

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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 be met by the earned profits. It is recommended that you use [our financial planning tool](#) for guiding you through all financial aspects needed to be considered for startup.

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#### TIP

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 help of financial experts, John has developed the following financial plan for his start-up business, which outlines the financial

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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

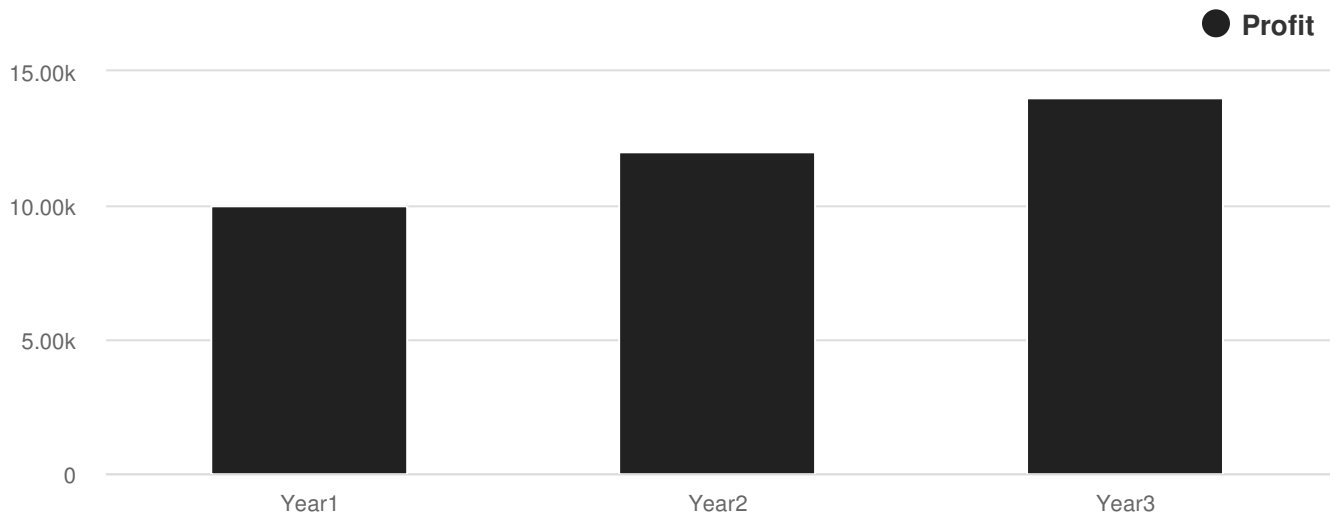
Monthly Units Break-even	5530
Monthly Revenue Break-even	\$159 740
<b>Assumptions:</b>	
Average Per-Unit Revenue	\$260,87
Average Per-Unit Variable Cost	\$0,89
Estimated Monthly Fixed Cost	\$196 410



## Projected Profit and Loss

	Year 1	Year 2	Year 3
<b>Sales</b>	\$309 069	\$385 934	\$462 799
Direct Cost of Sales	\$15 100	\$19 153	\$23 206
Other	\$0	\$0	\$0
<b>TOTAL COST OF SALES</b>	\$15 100	\$19 153	\$23 206
Gross Margin	\$293 969	\$366 781	\$439 593
Gross Margin %	94,98%	94,72%	94,46%
<b>Expenses</b>			
Payroll	\$138 036	\$162 898	\$187 760
Sales and Marketing and Other Expenses	\$1 850	\$2 000	\$2 150
Depreciation	\$2 070	\$2 070	\$2 070
Leased Equipment	\$0	\$0	\$0
Utilities	\$4 000	\$4 250	\$4 500
Insurance	\$1 800	\$1 800	\$1 800
Rent	\$6 500	\$7 000	\$7 500
Payroll Taxes	\$34 510	\$40 726	\$46 942
Other	\$0	\$0	\$0
Total Operating Expenses	\$188 766	\$220 744	\$252 722
Profit Before Interest and Taxes	\$105 205	\$146 040	\$186 875
<b>EBITDA</b>	\$107 275	\$148 110	\$188 945
Interest Expense	\$0	\$0	\$0
Taxes Incurred	\$26 838	\$37 315	\$47 792
Net Profit	\$78 367	\$108 725	\$139 083
<b>Net Profit/Sales</b>	30,00%	39,32%	48,64%

## Profit Yearly

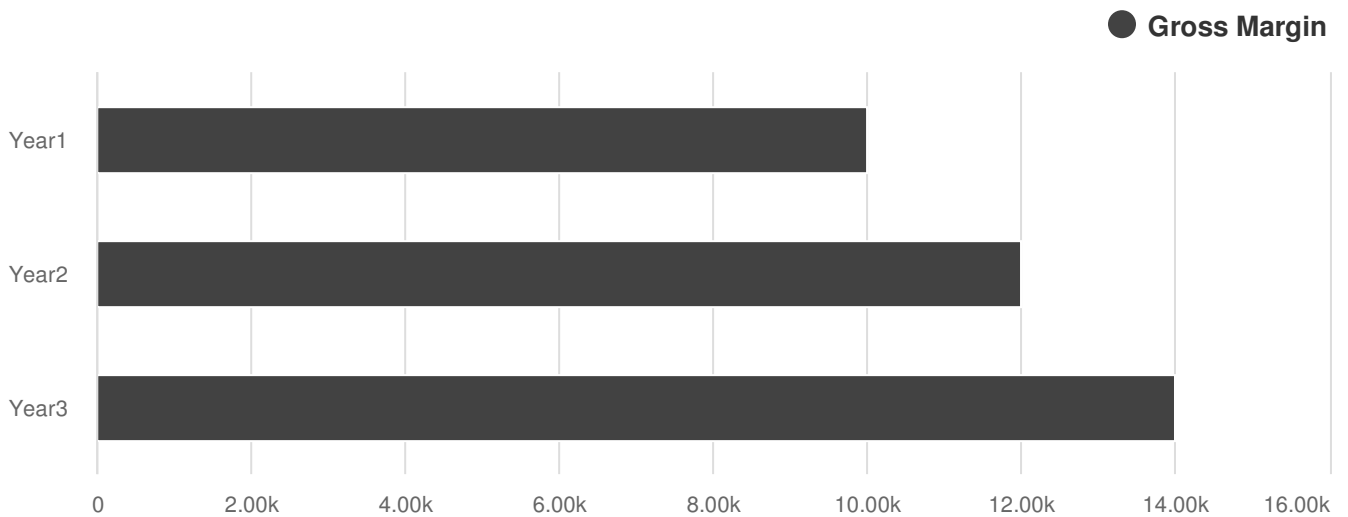


### Financial Year

### Profit

<b>Year1</b>	10000
<b>Year2</b>	12000
<b>Year3</b>	14000

## Gross Margin Yearly



### Financial Year

### Gross Margin

<b>Year1</b>	10000
<b>Year2</b>	12000
<b>Year3</b>	14000

## Projected Cash Flow

Cash Received	Year 1	Year 2	Year 3
<b>Cash from Operations</b>			
Cash Sales	\$40 124	\$45 046	\$50 068
Cash from Receivables	\$7 023	\$8 610	\$9 297
<b>SUBTOTAL CASH FROM OPERATIONS</b>	<b>\$47 143</b>	<b>\$53 651</b>	<b>\$59 359</b>
<b>Additional Cash Received</b>			
Sales Tax, VAT, HST/GST Received	\$0	\$0	\$0
New Current Borrowing	\$0	\$0	\$0
New Other Liabilities (interest-free)	\$0	\$0	\$0
New Long-term Liabilities	\$0	\$0	\$0
Sales of Other Current Assets	\$0	\$0	\$0
Sales of Long-term Assets	\$0	\$0	\$0
New Investment Received	\$0	\$0	\$0
<b>SUBTOTAL CASH RECEIVED</b>	<b>\$47 143</b>	<b>\$53 651</b>	<b>\$55 359</b>
<b>Expenditures from Operations</b>			
Cash Spending	\$21 647	\$24 204	\$26 951
Bill Payments	\$13 539	\$15 385	\$170 631
<b>SUBTOTAL SPENT ON OPERATIONS</b>	<b>\$35 296</b>	<b>\$39 549</b>	<b>\$43 582</b>
<b>Additional Cash Spent</b>			
Sales Tax, VAT, HST/GST Paid Out	\$0	\$0	\$0
Principal Repayment of Current Borrowing	\$0	\$0	\$0
Other Liabilities Principal Repayment	\$0	\$0	\$0
Long-term Liabilities Principal Repayment	\$0	\$0	\$0
Purchase Other Current Assets	\$0	\$0	\$0
Purchase Long-term Assets	\$0	\$0	\$0
Dividends	\$0	\$0	\$0
<b>SUBTOTAL CASH SPENT</b>	<b>\$35 296</b>	<b>\$35 489</b>	<b>\$43 882</b>
<b>Net Cash Flow</b>	<b>\$11 551</b>	<b>\$13 167</b>	<b>\$15 683</b>

<b>Cash Received</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Cash Balance</b>	\$21 823	\$22 381	\$28 239

## Projected Balance Sheet

Assets	Year 1	Year 2	Year 3
<b>Current Assets</b>			
Cash	\$184 666	\$218 525	\$252 384
Accounts Receivable	\$12 613	\$14 493	\$16 373
Inventory	\$2 980	\$3 450	\$3 920
Other Current Assets	\$1 000	\$1 000	\$1 000
<b>TOTAL CURRENT ASSETS</b>	<b>\$201 259</b>	<b>\$237 468</b>	<b>\$273 677</b>
Long-term Assets			
Long-term Assets	\$10 000	\$10 000	\$10 000
Accumulated Depreciation	\$12 420	\$14 490	\$16 560
<b>TOTAL LONG-TERM ASSETS</b>	<b>\$980</b>	<b>\$610</b>	<b>\$240</b>
<b>TOTAL ASSETS</b>	<b>\$198 839</b>	<b>\$232 978</b>	<b>\$267 117</b>
<b>Current Liabilities</b>			
Accounts Payable	\$9 482	\$10 792	\$12 102
Current Borrowing	\$0	\$0	\$0
Other Current Liabilities	\$0	\$0	\$0
<b>SUBTOTAL CURRENT LIABILITIES</b>	<b>\$9 482</b>	<b>\$10 792</b>	<b>\$12 102</b>
Long-term Liabilities	\$0	\$0	\$0
<b>TOTAL LIABILITIES</b>	<b>\$9 482</b>	<b>\$10 792</b>	<b>\$12 102</b>
Paid-in Capital	\$30 000	\$30 000	\$30 000
Retained Earnings	\$48 651	\$72 636	\$96 621
Earnings	\$100 709	\$119 555	\$138 401
<b>TOTAL CAPITAL</b>	<b>\$189 360</b>	<b>\$222 190</b>	<b>\$255 020</b>
<b>TOTAL LIABILITIES AND CAPITAL</b>	<b>\$198 839</b>	<b>\$232 978</b>	<b>\$267 117</b>
<b>Net Worth</b>	<b>\$182 060</b>	<b>\$226 240</b>	<b>\$270 420</b>

## Business Ratios

	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%
<b>Percent of Total Assets</b>				
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%
<b>Percent of Sales</b>				
Sales	100,00%	100,00%	100,00%	100,00%
Gross Margin	94,18%	93,85%	93,52%	0,00%
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%
<b>Main Ratios</b>				
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%
<b>Additional Ratios</b>				
Net Profit Margin	19,20%	21,16%	23,12%	N.A.
Return on Equity	47,79%	50,53%	53,27%	N.A.

	Year 1	Year 2	Year 3	Industry Profile
<b>Activity Ratios</b>				
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.
<b>Debt Ratios</b>				
Debt to Net Worth	0	-0,02	-0,04	N.A.
Current Liab. to Liab.	1	1	1	N.A.
<b>Liquidity Ratios</b>				
Net Working Capital	\$120 943	\$140 664	\$160 385	N.A.
Interest Coverage	0	0	0	N.A.
<b>Additional Ratios</b>				
Assets to Sales	0,45	0,48	0,51	N.A.
Current Debt/Total Assets	4%	3%	2%	N.A.
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.

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Use our business plan sections - competitive Analysis, comparison tables, SWOT Analysis, charts, timelines, milestones, etc to create a visually impactful business plan.

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Upmetrics business plan builder comes with beautifully designed cover pages. Choose professional, creative cover pages to make your business plan stand out.

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With Upmetrics you don't have to worry about navigating complex spreadsheets. Just input your numbers and we'll provide you with well-structured financial reports that you and your investors understand.

### 5. Share easily with anyone

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### 6. Real-time and Collaborative

Invite your team members to initiate conversations, discuss ideas and strategies in real-time, share respective feedback, and write your business plan.

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