



# Services Overview



## We are advocates of independent ownership and fostering the next generation of leaders into the funeral and cemetery profession

**Our vision** is to provide the highest level of succession planning, transaction, and advisory services to the funeral and cemetery profession. Our dedication and commitment to the profession is reflected in our ability to attract, develop, and retain exceptional team members. We are passionate about helping our clients make meaningful and lasting improvements in their business performance while serving as a guide through significant business milestones.

## Why Choose Foresight

### Passion

We care about your results. Your focus is on serving families. We focus on the financial and operational health of your business.

### Performance

We take a strategic approach to developing successful solutions and strategies for each of our clients. This allows you to remain strong and achieve your business goals.

### Personalization

We understand that no two businesses in our profession are alike. Our services are tailored to fit individual business needs.

## Our Values

### Compassion

*We do everything with intention*

- Recognize our clients' unique needs and offer personalized solutions
- Listen to our clients and understand their needs
- Our commitment to client satisfaction

### Integrity

*We adhere to the highest professional standards*

- We always do the right thing
- Treat clients with respect and dignity
- Protecting client confidentiality

### Accountability

*We do our best*

- Always apply best practices
- Ownership of our actions
- Open and honest communication

**Leadership has over  
100 years  
of combined funeral and  
cemetery profession  
experience.**



# Our Core Services



## Buying and Selling

We bring expertise, market knowledge, and negotiation skills to the table, ensuring the best possible outcome when buying or selling a business. Our role is to guide a buyer or seller through each step of the process to achieve your financial and strategic objectives.



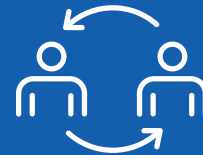
## Valuations

As an owner, understanding the value of your business is fundamental to operating strategically and developing a growth or succession plan. There are many factors to consider when valuing a funeral home or cemetery. We consider all essential aspects that influence your business worth.



## Business Financing

If you are an owner looking to expand, acquire a new location, add a crematory or building, you need capital. Foresight can help you secure the financing you require for all your business needs.



## Succession & Advisory Services

Our tailored succession planning and advisory services guide you through the process of understanding your financial health and provide solutions to maximize the value of your business to secure your legacy and exit strategy goals.