

# The Dallas Morning News

## Houston Company Launches Funeral Concierge Service *Everest Aims to Lighten Grieving Families' burdens*

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By Bob Moos

When Sam Wilkins' mother died a month ago, he didn't call a funeral home.

He phoned a funeral concierge.

The word concierge brings to mind someone who irons out life's little wrinkles, like getting theater tickets at the last minute. But a Houston company, Everest Funeral Package, has launched what it describes as "the first nationwide funeral concierge service." Everest's concierges help families plan a funeral, even negotiating terms and prices with funeral homes.

He and his sisters were scattered from San Francisco to New York and weren't sure how to make arrangements for their 83-year-old mother's funeral in Atlanta. An Everest adviser recommended a mortuary, alerted the cemetery and found a casket for \$1,300 less than the funeral home would have charged.

"Relying on the concierge gave us time to console ourselves, fly to Atlanta and talk about what we wanted to say at Mother's service," Mr. Wilkins said.

Everest grew out of collaboration between president and chief executive Mark Duffey, who had led a funeral home company, and Plano-based Electronic Data Systems Corp. "If it hadn't been for EDS, we wouldn't be here," Mr. Duffey said.

### INFORMED CHOICES

About 2.5 million Americans are expected to die this year. If the past is any indication, most of their families will contact the funeral home down the street or one they've called on before.

Consumer advocates say that's not necessarily the best choice. "It's sad – most people know more about buying a stereo system than they do about burying their loved ones," said Joshua Slocum, national director of the Funeral Consumers Alliance. A traditional funeral, including a casket and vault, costs about \$6,000, although "extras" such as flowers and limousines can add thousands to the price, according to the Federal Trade Commission.

"Yet even if you're the kind of person who might haggle with a dozen car dealers to get the best price, you're likely to feel uncomfortable shopping around and negotiating over the details of a funeral," the FTC says. Compounding that discomfort is the fact that some people spend beyond their means because they think a funeral reflects their feelings for their lost loved one, the agency adds.

Enter Everest's concierge service.

### RESOURCES

AARP: [www.aarp.org](http://www.aarp.org) or 1-888-687-2277

Everest Funeral Package: [www.everestfuneral.com](http://www.everestfuneral.com) or 1-866-685-4878

**[www.everestfuneral.com](http://www.everestfuneral.com)**

**1-800-913-8318**

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Federal Trade Commission: [www.ftc.gov](http://www.ftc.gov) or 1-877-382-4357

Funeral Consumers Alliance: [www.funerals.org](http://www.funerals.org) or 1-800-765-0107

National Funeral Directors Association: [www.nfda.org](http://www.nfda.org) or 1-800-228-6332

### KNOW YOUR RIGHTS

A federal law makes it easier to choose only those goods and services you want or need for a funeral.

The Federal Trade Commission's "funeral rule" says:

- The funeral provider must give you itemized prices in person and, if you ask, over the phone.
- Many funeral providers bundle goods and services into packages, but you have the right to buy individual items.
- If state or local law requires you to buy a particular item, the funeral provider must disclose it on the price list.
- The funeral provider can't refuse or charge a fee to handle a casket you bought elsewhere.

"We work as advocates for the families," Mr. Duffey said, noting that the company receives no fees or commissions from the industry. "We ask our clients what they want, then we find the requested services at the best prices."

The privately held company launched in 2003 in Canada, where it received the endorsement of the Canadian equivalent of AARP, and it's now entering the U.S. market. At the outset, the concierge service is available only to Fidelity Security Life Insurance Co. policyholders. But it will be sold separately within a few months, Mr. Duffey said.

The funeral planning comes at no additional cost to policyholders, though a 60-year-old man pays a \$50 monthly premium for \$10,000 in whole life insurance to cover funeral and burial expenses. Someone buying just the concierge service will pay a onetime fee of \$495 (individual) or \$695 (couple) or a yearly membership fee of \$48 (individual) or \$68 (couple), Mark Duffey said. Everest visits over the phone with each of its new clients to find out their funeral and burial wishes. It stores those plans in a database until they're needed. EDS helped Mr. Duffey develop the company's business strategy and implement it. "We're always looking for new markets, and the funeral industry was one such opportunity," explained Steve Lueckemeyer, a client delivery executive for EDS. EDS now has a contract with Everest to provide technical support.

The concierges operate out of an EDS call center, where they're available at a toll-free number 24/7. When a death occurs, a senior adviser in Houston takes over and works with the family. "The concierges aren't your typical call center operators," Mr. Duffey said. "They aren't judged for their speed. On the contrary, they're encouraged to have long conversations with clients."

Mr. Wilkins' adviser spent two hours on the phone, going over funeral details with the family.

Mr. Duffey said he hires concierges not for their salesmanship but for their empathy — some are former funeral directors. All go through several weeks of training.

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### DEMAND MAY INCREASE

The company has caught the attention of experts in the aging field, who expect the service will be especially popular with boomers handling funeral arrangements for parents. Just as the nation's 77 million boomers have wielded so much influence over American life, so they are forcing the funeral industry to adapt to their preferences and tastes. In some families, traditional funerals have given way to banquets that celebrate the deceased's life, complete with dove or balloon releases.

"Everest is likely to cause the funeral home industry to stand up and take notice," said Joseph Coughlin, director of the Age Lab at the Massachusetts Institute of Technology. Mr. Coughlin, whose lab helps craft business solutions for an aging population, called Everest "the quintessential boomer company" because it gives boomers what they want most – control. "The concierges give the adult children the upper hand," he explained. "Families don't have to rely on only the funeral home down the street anymore."

Jim Bates, president of the Funeral Consumers Alliance of North Texas, said he often gets calls from families who feel they've been sold services they don't need or want. "They know they didn't get the best deal, but they agree to it because they're overwhelmed with grief," he said. "A concierge service that helps people shop around makes sense."

Others see the service as part of a larger industry trend to make funeral planning more convenient for families. "Our whole mission in recent years has been to make it easier for someone to plan a funeral, either beforehand or at the time of death," said Terry Hemeyer, a managing director for Houston-based Service Corp. International, which operates 13 Dignity Memorial funeral homes in the Dallas-Fort Worth area.

### REACHING OUT

Funeral providers are required by federal law to give families itemized prices in person and, if they ask, over the phone, Mr. Hemeyer said. "I don't understand why people would pay close to \$1,000 for information they can get for free by making a few phone calls," he said.

Everest intends to market its services to financial planners, hoping to reach the 4 million Americans who do end-of-life planning each year, Mr. Duffey said. "We aim to get our fair share of that market," he said. One of those customers will be Sam Wilkins. After his satisfying experience with Everest following his mother's death, he plans to buy insurance for his wife and himself. "A death in the family is the worst possible time to make decisions," he said. "I want my children to be able to pick up the phone and have someone in their corner."

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