



# OFDA Annual Educational Conference - Maui

January 31 - February 7, 2020 Pre-Tour to Honolulu Available



**Featuring six nights in Maui & 12 hour CE credit!**

*Trip includes: roundtrip airfare from Columbus, Cincinnati, or Cleveland; six nights hotel accommodation, airport transfers, full breakfast buffet daily, welcome cocktail reception, farewell lu'au & hotel taxes/service fees/porterage*

Phone: 614-451-4882

Book Online: [www.ofdaonline.org](http://www.ofdaonline.org)

Conference Partner:



## Optional Whale Watching Tour - Feb 1, \$99/Person

Experience the thrill of whale watching in Maui on a **2-hour** whale watching cruise. Depart from Lahaina Harbor for a Maui whale watching experience you'll always remember. The big, comfortable boats get you quickly to each whale sighting, and there's an enclosed main cabin and upper observation deck to ensure dry, excellent visibility.



Set upon 40 oceanfront acres on Maui's Kaanapali Beach, Hyatt Regency Maui Resort and Spa offers a true getaway in paradise. Cool off in one of six free-form pool areas with waterfalls, all surrounded by lush tropical plants on the edge of the Pacific Ocean. Dine at 10 onsite restaurants, including Japengo, voted Maui's Best Asian and Pacific Rim Cuisine. Retreat to the resort's beachfront spa or enjoy your room, many with panoramas of the Pacific Ocean.

### Day by Day Itinerary

January 31: Depart Ohio, Arrive Maui

February 1: Optional Whale Watching Tour & OFDA Cocktail Reception

February 2: Morning Seminar\*

February 3: Morning Seminar

February 4: Morning Seminar

February 5: Farewell Lu'au

February 6: Overnight Flight Home

February 7: Arrive Home

\*Seminar Fee (includes all three days): \$250/person for tour participants (air/hotel package booked with WOT) or \$400/person for non-tour participants.

### Room Options and Pricing (TP = Optional Travel Protection):

- **Golf/Mountain View** - These rooms feature either one king bed or one queen and one double bed. All rooms have a private lanai.  
**\$3299 Double Occupancy/Person (\$276 TP), \$4299 Single (\$353 TP)**
- **Ocean View** - Take in scenic island views from this 451 square foot ocean view room. Features include: one king or one queen and one double bed, contemporary Hawaiian decor, and a private lanai boasting views of the Pacific and the islands of Lana'i and Moloka'i.  
**\$3599 Double Occupancy/Person (\$276 TP), \$4899 Single (\$388 TP)**
- **Pre-Tour to Honolulu** - Join us January 29-31 for a pre-tour to Hawaii's capital, Honolulu. Highlights of this tour include two nights at the Outrigger Waikiki Beachcomber, Honolulu city tour & visits to Punchbowl Cemetery and Pearl Harbor. Flight to Maui incl.  
**Optional Add-On: \$699 Double Occupancy/Person, \$999 Single**

### Deposit, Payment & Cancellation

A deposit of **\$1000** per person is due at the time of booking and to secure your reservation. Final payment is due **November 2, 2019**. All cancellations made before **November 2, 2019** are subject to a cancellation handling fee. After this date, cancellations are non-refundable (if not covered by optional travel protection).

# Ohio Funeral Directors Association

## AEC Maui CE Session Outline

We are thrilled to bring you a variety of topics this year, as well as presenters that are new to OFDA audiences. Our featured speaker, Codi Shewan, travels from Canada to offer 9 hours of insightful business and communication CE. Conference sponsor and OFDA Preferred Partner Live Oak Bank's own Nick Padlo touches on financing options available in the market today, and the final 2 hours of CE will relate to OBEFD mandatory topics – presenter TBD. Seminars will be held February 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> from 8:15 am – 12:15 pm with a total of **12 CEs** available.

### Meet Your Presenters

**Codi Shewan:** Codi is the President & Founder of EverLearn Associates, a full service, comprehensive management consulting firm, for the funeral and cemetery profession aimed at engaging and building dynamic teams and successful businesses. Operating across North America, EverLearn Associates is known for aligning closely with clients to provide tailored solutions, which overcome their operational challenges and align their business goals with success. Working with some of the profession's finest operators, EverLearn Associates focuses on the tenet of 'People first; always.' and has enveloped that philosophy in all their consulting lines of business: HR, marketing, business strategy and digital solutions.



Codi will present three different programs, 3 hours each day

#### **Innovate or Evaporate! The Risk in Being Change Averse – 3 CE pending approval**

Disruption is bound to affect almost every business. Smart organizations embrace innovation and creativity and avoid being disrupted. Those who don't, become the disrupted. Innovate or Evaporate pulls back the veil on innovation and dials participants into their core values and builds on their fundamental principles. Being laser focused on your value proposition enables you to see gaps and respond accordingly, before someone else does – capturing your market share and leaving you wondering what happened!

Participants will learn how simple steps can position them to remain not only relevant, but also engaged with their clients.

#### **Going Forward: Business Unusual – 3 CE pending approval**

Business as usual, isn't working anymore. The main reason? It's not business as usual anymore. Innovation will soon become the single biggest differentiator between those businesses who thrive, and those who just survive. Committing to business unusual, instead of 'as usual', will not only determine your future success, but also become the mantra of those who become any profession's game changers. Accepting the new normal and taking control of your future proactively will enable you to re-invent and re-invest yourself, to tackle any challenge before you! Change isn't easy, but it can be when you re-frame your approach to it and this presentation will do just that!

Today's customer often embodies our greatest challenge - the oxymoron of wanting less, yet wanting or demanding more. Taking a closer look at the customer of today and exploring ways to expertly communicate our value proposition to them, is now more critical than ever.

### **Communication Elevation: Strategies for Taking Your Communication to the Next Level – 3 CE pending approval**

Communication problems in the workplace can have a negative impact on morale, productivity and your teams working relationships. Left unchecked, ongoing communication issues or even communication blind spots can potentially cut into profits, increase turnover and lead to mistakes that negatively impact an organization's public image. Communication is the single contributor to an engaged workplace, and engaged workforces perform 20% better and are 87% less likely to leave your employment. Team members who are recognized for their efforts will create 50% higher customer loyalty, achieve 50% higher sales, and earn 27% higher profits. If communication is central to such success, having optimized and effective communication as a central focus of your organization is critical!

Communication Elevation is a program designed to help leaders and their teams discover their unique communication style, the styles of those around them, and how to take their communication to the next level!



**Nick Padlo:** Nick is Vice President with Live Oak Bank Funeral Home & Cemetery Division. Nick Padlo joined Live Oak Bank in 2014 as a business advisor servicing Healthcare customer in the northeast. He also worked as an underwriter for Live Oak's Agriculture Lending team. Since 2016, Nick has dedicated himself to developing new business relationships with customers and referral partners as the Vice President for the Funeral Home and Cemetery Lending team. Nick attended St. Bonaventure University majoring in finance and minoring in economics.

Nick will present a one-hour program

### **Funeral Home Financing Options and the Impact Your Preneed Program Has on Analysis - 1 CE pending approval**

Funeral Home owners have various options including: Acquisitions, Expansions, Refinances, and Equipment Purchases and there are various loan products available including: SBA 7a and 504, Conventional and USDA options. The presentation will include examples of these financing products and how a variation of these loan products can help the business owner reach their goals. Preneed activity is not part of the financial metrics when analyzing the historic cash flow of a business since revenues are not guaranteed and will only be part of future cash flow; however, preneed activity still plays an important role when looking at the business and its opportunity from a global perspective. The presentation will involve real life loan examples to where preneed activity, or lack thereof, has either hindered or helped a customer's ability to obtain financing for their needs.

### **OBEFD Mandatory CE Topics – 2 CE pending approval**

Presenter(s) and programs to be determined

# OFDA Annual Educational Conference Registration Form

Name of Funeral Home

Preferred Departure Airport

Guest 1 Name - As Appears on Passport

Date of Birth

Guest 2 Name - As Appears on Passport

Date of Birth

Guest 1 Preferred Name (for name tag)

Guest 2 Preferred Name (for name tag)

Guest 1 Email

Guest 2 Email

Main Contact Mailing Address

Main Contact Cell Phone

Main Contact Home Phone

Emergency Contact & Relationship

Email

Phone

Room Category

Golf/Mountain View  Ocean View

Bedding

One Bed  Two Bed

Pre-Tour to Honolulu

Yes  No

Whale Watching

Yes # \_\_\_\_

Guest 1 Seminar (\$250)

Yes  No

Guest 2 Seminar (\$250)

Yes  No

Guest 1 Travel Protection

Yes  Declines

Guest 2 Travel Protection

Yes  Declines

Please include your **\$1000** deposit per person. If you have elected insurance, the premium is included in your initial deposit. Checks should be made payable to World of Travel and sent to 5001 Horizons Dr., Suite 100, Columbus, OH 43220. To pay by credit card, please complete:

Card Number

Expiration Date

Security Code

Signature/Date

Amount to be Charged

*\*If you would like to use air or hotel reward points, please contact World of Travel at 614-451-4882. Also, if you are a non-tour participant (seminar only), please note this at the top of the registration form and include a check for \$400/person (this fee covers the seminar on all three days - no social functions).*