

# Funeral Home Referral Packet

A structured next step for families when arrangements conclude. Holding Ground picks up where funeral aftercare ends—handling the administrative weeks ahead without expanding your aftercare scope or competing with the services you already provide.

## CO-BRANDING

*Your Practice / Firm / Funeral Home Logo Here*

Request a co-branded version at [support@weholdground.com](mailto:support@weholdground.com)

## Who We Are

Holding Ground is a bonded, insured operational coordination practice that supports families through the weeks of administrative work that follow a service. We do not provide grief counseling, memorial products, or pre-need planning. We exist specifically to be the answer your aftercare team can give when families ask 'What do I do now?'

## Why This Packet Exists

This document is built to live in your funeral directors & aftercare teams workflow. It explains who Holding Ground is, what we do (and don't do), how a referral works, and how families experience the handoff. Use it internally, share it with colleagues, or hand it directly to a family. Co-branded versions are available on request.

# What Holding Ground Handles — And What We Don't.

WHAT WE HANDLE	WHAT WE DO NOT HANDLE
<ul style="list-style-type: none"><li>• Death certificate distribution coordination</li><li>• Social Security, pension, and benefit notifications</li><li>• Bank, brokerage, and account closures</li><li>• Subscription, utility, and recurring service cancellations</li><li>• Insurance claim coordination</li><li>• Asset inventory and document organization</li><li>• Communication with the family's attorney and accountant</li><li>• Weekly status updates to the family</li></ul>	<ul style="list-style-type: none"><li>• Funeral or memorial arrangements of any kind</li><li>• Pre-need planning or grief counseling</li><li>• Legal advice or court filings</li><li>• Tax preparation or financial planning</li><li>• Marketing of grief or memorial products</li><li>• Anything that conflicts with the funeral home's aftercare scope</li></ul>

## Problems We Reduce For Your Practice

OPERATIONAL RELIEF
<ul style="list-style-type: none"><li>• Aftercare calls about administrative questions outside your scope</li><li>• Families pressing staff to recommend attorneys, advisors, and form helpers</li><li>• Liability exposure from informal referrals to unvetted services</li><li>• Reputation risk when a family flounders post-service</li><li>• Aftercare team burnout from logistical conversations they aren't trained for</li><li>• Lost relationship continuity when families disappear into administrative chaos</li></ul>

*We are administrators, not attorneys, accountants, or fiduciaries. The professional decisions stay with you. We operate under written confidentiality protocols and a fixed scope-of-work that explicitly preserves your relationship with the family.*

# A Predictable Handoff—For You And The Family.

<p><b>01</b> <b>Intake</b></p> <p>Family receives a Holding Ground partner card at the arrangement conference. They reach out on their own timeline.</p>	<p><b>02</b> <b>Triage</b></p> <p>Within 48 hours of contact, we assess the family's situation and confirm scope. The funeral home is never invoiced.</p>	<p><b>03</b> <b>Coordination</b></p> <p>We take on the administrative work—notifications, closures, documents—keeping the family's attorney looped in.</p>	<p><b>04</b> <b>Tracking</b></p> <p>Families receive weekly status updates. Your aftercare team can request a status summary on shared families.</p>	<p><b>05</b> <b>Resolution</b></p> <p>We deliver a final completion report. The path through the administrative weeks started with your referral.</p>
--	---	--	--	---

## Trust & Standards

### TRUST INDICATORS

- Bonded and liability-insured coordinators
- Written confidentiality and non-solicitation protocols
- Discreet, brand-aligned family communication
- No commission, kickback, or referral fee arrangements
- Funeral-director-only contact line for partner questions
- Annual partnership review with shared-family outcomes

## Fees & Engagement

Holding Ground engagements are fixed-fee and paid by the family. The funeral home is never invoiced and never holds a financial relationship with our work. There are no referral fees in either direction—the partnership is built on shared standards of care.

# Collaboration Models & Family Scripts.

## Aftercare Card Partnership

Holding Ground partner cards are included in the aftercare folder families take home. We follow up only when families initiate contact.

## Aftercare Coordinator Referral

Your aftercare coordinator introduces Holding Ground when administrative questions arise during routine follow-up calls.

## Preferred Provider Listing

Holding Ground appears in your community resource guide alongside attorneys, grief counselors, and other vetted partners.

## Sample Family Introduction Scripts

*“Once arrangements are complete, families often face weeks of administrative follow-up—Social Security, accounts, subscriptions, insurance. We’ve vetted a coordination practice called Holding Ground that handles exactly that. They’re bonded and insured, and they don’t market grief services or compete with anything we provide. We’ve included their card in your folder if you’d like a structured next step.”*

*“If you’d rather we make the introduction directly, I can pass your name to their intake team and they’ll reach out on your timeline—no pressure, no follow-up unless you ask.”*

## Common Questions From Partners

### Will you contact families we haven't referred?

No. We only contact families who initiate the conversation themselves.

### Will you compete with our aftercare program?

No. We do not provide grief support, memorial services, or any aftercare service you offer. We pick up specifically where most aftercare programs end.

### What if a family has a complaint?

We make any concern visible to you immediately. We over-communicate with referring partners about anything that could affect their reputation.

### How do families pay?

Families engage us directly under a fixed-fee scope. The funeral home is never billed.

## Start A Partnership Conversation

[support@weholdground.com](mailto:support@weholdground.com) · 705-955-1977 · [weholdground.com/partners](http://weholdground.com/partners)