

Sheltering legacies, weathering change.

Funeral Partners looking after your
past, protecting your future.



Deciding to sell your business can be one of the hardest decisions you will make as a business owner. Whether your motivation is to embrace a new challenge, capitalise on business growth, relocate, or spend more time with your family.

As a business owner, you've put your heart and soul into building your business. You've overcome countless challenges, made pivotal decisions and worked tirelessly to see it thrive.

In the ever-changing landscape of funerals today, post-regulation, one thing remains constant: the need for proactive succession planning and protection.

Remember, a business legacy isn't just about what you achieve during your tenure – it's about creating something that will thrive on its own and continue to make a difference in the community.

By selling your business, you not only protect your business legacy, but also provide a clear path for its sustained growth and prosperity, even in your absence.



“Funeral Partners invest in family businesses, protecting their heritage and retaining their local identity. As a former funeral director myself, I fully understand the importance of protecting your brand’s hard-earned reputation and continuing to provide the highest levels of customer and community service.”

Sam Kershaw, Chief Executive Officer

Our name is recognised in the profession for integrity and honesty. We have welcomed over 140 family businesses to our group, conducting over 28,000 funerals each year across our 250 branches. Operating in England, Scotland, Northern Ireland and Wales. We pride ourselves on the longstanding relationships we keep with former owners and the fact that many choose to stay with us long after selling their family business.

The value, quality and truth of what we say must be judged based on direct experience with it.

Here we talk to three former owners to understand their route to partnership, and experiences before, during and after joining Funeral Partners.

Read on to find out more from Andrew Grey, Alison Lawson, and Simon Broome.



Weathering a regulation storm

Since 2020, you and your business have battled a global pandemic, rapidly rising prices and ever-increasing industry regulation. Following the CMA regulations in 2021, and the FCA's regulation of pre-paid funeral plans in 2022, the ongoing bureaucracy of operating a funeral business is making it more difficult for you and your team to deliver these services.

In addition to the CMA and FCA, the funeral industry awaits the Fuller inquiry and the recommendations it contains on funeral services, the care of the deceased and mortuaries. The spotlight on the areas under investigation is even more prominent following the uncovering of the tragic events in Hull in March 2024. We are preparing for the inevitable increase in requirements in our own funeral homes.

If you're thinking of selling your business, then regulation is one of the key burdens we can ease. We have dedicated teams of experts in FCA and CMA compliance

that take the weight off your shoulders from day one. We prepare all the required documentation and submissions as well as provide all the necessary training. Gone will be the days of confusing rules and legislation.

We also invest in your premises and will assess any maintenance that is required during the transaction. Our local operations teams will work with you to identify areas of improvement and we will implement those once you are part of our group. In some instances, you may have different ways of working and better processes than us and we will want to learn about these from you so that we can roll them out to the other 140 family businesses in our group. We strive to be the best at what we do and that starts with where we work.

Let us take on your bureaucracy. We want to get you back out there, doing what you do best.

We have dedicated teams of experts in FCA and CMA compliance that take the weight off your shoulders from day one



Andrew Grey Funeral Directors (Tyne & Wear)

Andrew Grey Funeral Directors has been serving families in the Sunderland area since 2011, with four branches across Tyne and Wear.

Andrew's first experience of funerals came when he was a child, as his parents Syd and Mary were Lay Ministers at the Easington Lane Independent Methodist Church, where they would help conduct services.

After leaving school, Andrew learned to play the piano and keyboard at the same church, and embarked on a music career which took him around the country.

“John G Hogg Funeral Directors joined Funeral Partners five years ago and John is a good friend of mine. We’ve kept in touch, so I was able to talk to him about his experience.”

He later returned full-time to the northeast and trained as a Funeral Director in 1998 with Scollen & Wright Funeral Service in Sunderland.

Eventually, with the support of long-term partner Gillian Mason, Andrew set up his own funeral company in Hetton-Le-Hole in a building he renovated himself.

With his young son not having the ambition to join the funeral industry, Andrew, who is now Business Principal, began speaking to Funeral Partners back in 2019.

Discussions continued into 2020, however the Covid-19 pandemic meant discussions were put on hold.

Andrew was then contacted by Funeral Partners in August 2023 to revive talks, more than three years after the initial contact.

“John G Hogg Funeral Directors joined Funeral Partners five years ago and John is a good friend of mine. We’ve kept in touch, so I was able to talk to him about his experience.”

Andrew said his earlier discussions with Funeral Partners prepared him for the due diligence required to complete the sale.

“There’s no getting around the fact there is a lot to do, but for a small to medium size business it isn’t unmanageable, but it may be more than you realise,” he explained.

The integration process was complicated a little due to timings; the deal was done just days before Andrew was due to go on holiday, but he praised Head of Acquisition Integration David McCarthy for working hard around his schedule.

He urged any owners looking to sell to let their teams know and understand the reasons for the change in the business. It is better to have those conversations to reassure and alleviate questions and any concerns.

“There is more administration and training, but as long as the team understand the importance of the changes particularly in compliance and

“Now, as a team, we’ve got so much more support from neighbouring funeral directors who are part of Funeral Partners.”

regulation, it's not being done for the sake of it, then that can be seen as a positive. Having a dedicated HR business partner to support with our team members has been so valuable to us."

In the lead-up to the acquisition, Andrew and the Acquisitions Team outlined a wish list of investment opportunities that would be required to improve the business including more staff, additional vehicles and changes to his funeral homes.

There has been an increased investment in our marketing ensuring our funeral homes are being professionally promoted locally and in the online space, plus being able to increase our involvement with community activity has been welcomed by the team.

"All of the agreements which were made about investment have been stuck to," he said.

"We have doubled the size of our team with three more people, and we have a new fleet whereas we had previously rented our vehicles."



Andrew Grey, Andrew Grey Funeral Directors,
Tyne & Wear

"I have no immediate plans to retire, I am happy to carry on for as long as I want to and I now have options for the future."

"There were also decoration, refurbishment improvement required across our four offices, and although understandably it took a little time, they were all done and done very well. There were no shortcuts or cheap options taken."

"Now, as a team, we've got so much more support from neighbouring funeral directors who are part of Funeral Partners."

"I know now, that if something happened to me tomorrow, the business is in safe hands and would be able to carry on."

Andrew said ***"Our families wouldn't notice a difference in the top-class care and support they receive, joining Funeral Partners was a good decision for me, my team and my family."***

"Funeral Partners let us run things as we have always done with families. I now have more personal time to spend with my family, go out, walk my dog, and speak to people."

"Funeral Partners is an apt name, because I do feel like it is a partnership."

"We have doubled the size of our team with three more people, and we have a new fleet whereas we had previously rented our vehicles."

J & D Lawson Funeral Directors (Glasgow)

J & D Lawson Funeral Directors, then based in Glasgow, began as a side-line to a transport company in the 1890s and was one of many Lawson Brothers' businesses in the 19th century before becoming the family's priority in the early 1960s.

John and David Lawson, the grandfather and father of current Business Principal Alastair Lawson, then decided to focus all their energy into the funeral business. David built bespoke premises in Kirkintilloch in the late 70s, laying the foundations for the business's rapid modernisation.

Alastair left an engineering career to join the family business in the early 80s and took over as Managing Director in the mid-90s, overseeing some of the funeral home's biggest changes with new mortuaries, embalming facilities and staff.

He met his now wife and the business' Finance Manager Alison in 1990 after conducting her grandfather's funeral. She left her job as a financial manager for a food production and distribution company in 2003 and used her experience to support the J & D Lawson's team and the business administration processes.

When Alastair began thinking about his retirement and without any clear succession from within the family, he started contemplating the future of the business.

He and Alison decided selling was the most viable option but were struggling to find the right partner until they saw an advert from Funeral Partners in a funeral trade publication. They knew that Funeral Partners had a Chief Executive and Senior Team with many years of experience in the industry.

Alison said: ***"It said that Sim & Son Funeral Directors in Glasgow had joined Funeral Partners, and Alastair called***

"The business is still as successful as it always was, we are operating as before with the additional support and structure that being part of a network brings, and still looking after and serving our local community with the same quality of care."

Steve there to discuss his experience of the acquisition and of Funeral Partners.

J & D Lawson Funeral Directors joined Funeral Partners in late 2021.

The first person that Alastair and Alison met from Funeral Partners was Acquisitions and Mergers Director Steve Wilkinson, followed by David McCarthy, Head of Acquisition Integration.

"I felt at ease with Steve and liked what he had to say about Funeral Partners,"
Alison said.

"But the icing on the cake for me was when I met David. We instantly clicked, and I knew I could work with him during the integration.

"This turned out to be straightforward, user-friendly and all of my team warmed to David, who gave us confidence about the future of J & D Lawson and we were completely up and running within ten weeks.

"One of my main concerns had been for my staff, who have been loyal to us for many years, and we were assured their circumstances would not be negatively affected. That was pivotal for us."



Alison Lawson, J & D Lawson Funeral Directors, Kirkintilloch, Scotland

“I can honestly say that our experience of becoming part of the Funeral Partners family has been overwhelmingly positive.”

Now, nearly two years since they joined Funeral Partners, Alastair has moved into semi-retirement and is enjoying his free time, and Alison has just one objective as she continues in her role, to support the team and the business.

“The business is still as successful as it always was, we are operating as before with the additional support and structure that being part of a network brings, and still looking after and servicing our local community with the same quality of care.”

Alison said selling to Funeral Partners and the changes that went with it had undoubtedly been worthwhile because herself, Alastair and the team are now enjoying a better quality of work and personal life.

“The only concerns from the local community prior to us selling related to potential team changes, but Funeral Partners remained true to their word and we were able to retain our original employees, who have continued to uphold our well established reputation.

“I can honestly say that our experience of becoming part of the Funeral Partners family has been overwhelmingly positive.”

Edwin Pounds & Sons

Funeral Directors (Bradford)

Edwin Pounds & Sons has been operating on the same site in Bradford for more than 100 years, initially working in the farming and coal industries before moving exclusively into funerals after the Second World War.

The centenary of Edwin Pounds & Sons was in 2004 when Charles, Edwin's last remaining child, was still working in the business at the age of 85. He passed away in 2006, leaving granddaughter Judith and great-grandson Simon Broome to run the business.

Judith retired in 2007, leaving Simon in charge, with his wife Helen working as the Office Manager.

Simon remains the Business Principal for Edwin Pounds and is proud to have continued working from the premises in which his grandfather spent much of his life.

With Simon and Helen's two children following their own paths in life, there was no succession plan that secured the future of the business. Simon decided to explore alternative options through the sale of the business.

"I spoke to my family about it, and when I explained the situation fully, they understood why we were looking at our options."

"We then went out to several companies, and Funeral Partners still seemed the best option. They didn't seem profit-focused – much more about the clients and their families."

"Calm, helpful and supportive. Nothing was too much trouble for David and the Funeral Partners team."

Simon received a leaflet from Funeral Partners and decided to take the plunge and give the team a call. He said the call was relaxed and informal, and at no point did he feel under any obligation.

"We then went out to several companies, and Funeral Partners still seemed the best option. It didn't seem profit-focused – much more about the clients and their families."

Simon said he found the due diligence process more difficult than expected, especially when running the business at the same time. He recommends having an experienced solicitor during this process to support you.

"It's a long process which takes quite a bit of time and goes into great detail," he said.

Simon goes on to explain: ***"The other difficult part was, for the majority of the time, it was confidential, so we were trying to get things together without yet informing the staff, while also arranging and conducting funerals."***

The team at Funeral Partners also supported us when communicating with the team about the changes.

He praised Funeral Partners Head of Acquisition Integration David McCarthy, who spent a month with the team at Edwin Pounds & Sons following the sale.

Helen explained ***“David knew exactly when to step in and explain something, and when to just let us get on with what we were doing, always being calm, helpful and supportive, nothing was too much trouble for him and the rest of the Funeral Partners team.”***

Brand Expanded to Second Branch in Wibsey

Less than a year after joining Funeral Partners, we are delighted to have expanded the brand by opening another branch of Edwin Pounds & Sons on the other side of Bradford in Wibsey.

“It’s working out exactly as we had hoped, with people across the city knowing who we are, and them being able to access us more easily.”

Simon said his team had worked hard to get used to new ways of working, mostly

brought about by the CMA and FCA regulations, plus adjustments to their on-call rota, but were now adapting well.

“It has definitely been a weight off my shoulders. I was trying to be a Funeral Director and deal with all the legal aspects, the paperwork, and the regulations.”

“Now I have got Funeral Partners behind me, I can get out again and meet people. That’s what I am good at and why I love the job.”

“It’s working out exactly how we had hoped... Choosing Funeral Partners was a great decision for our business and our future.”



Business Principal Simon Broome and Funeral Arranger Brigid-Mary Oates outside new branch Edwin Pounds & Sons Funeral Directors, Wibsey

Some frequently asked questions, answered

What is your approach to property?

If you own the freehold, either we can purchase this with the business or you can retain it and we will rent it from you on a long-term lease. If you do not own the freehold, we will either enter into a new long-term lease with the landlord or take over the existing lease.

How will my business change post-acquisition?

As part of the due diligence process, we will work collaboratively with you to develop a tailored integration plan. Whilst there will be some changes, we will work closely with you to help ensure we preserve what makes your business great, including keeping the name above the door and protecting the heritage and tradition of the business.

I have younger family members in the business. What will happen to them?

Having existing family within the business is important to us for continuity of service and reputation. With the support of the Funeral Partners network, younger family members can prosper and one day manage the business, continuing its success thus far. Being part of the Funeral Partners network also allows family members to explore training and other roles across the wider organisation; whether this is a management position or a move into a head office function such as moving into support function, the opportunities are plentiful.

What will happen to my employees?

Safeguarding the interests of employees is central to our acquisition approach. Employees won't be worse off and we will protect their current terms and conditions.

We will provide all employees with training and development opportunities that will allow them to thrive under Funeral Partners ownership.

Will a new manager be drafted in to control the business?

No – through the acquisition process, we will work with you to understand the needs of the business and how best to support these. You will have the continued support of our regional team and head office functions. Additional local resources and support can be provided, but this will depend on the situation.

Safeguarding staff

We recognise how important your employees are to the continued success of the business and that for a lot of owners, employees are family members and close personal friends.

When you're ready to tell your staff, we will be on hand to support you; we find doing this pre-completion works best. We want to reassure staff that their jobs are safe, have the opportunity to meet some of us and provide them with the necessary information and support.

A Questions and Answers booklet will be provided to staff containing a comprehensive suite of information, answering key questions and documenting what staff can expect over the coming weeks.

Your Heritage and Reputation are important to us.

As Funeral Directors ourselves, we really do understand just how important your reputation is. Working with us means that your community will continue to be served in the same way that you have previously served as an independent family-run business. We wouldn't want it any other way.

Creating a deal that is tailored to your needs

We offer a great range of flexibility in our negotiations because we want to ensure that our prospective funeral homes have a deal that is tailored to them. This isn't merely on a business level with the numbers and legal structure that any deal will involve, but also on an emotional level where the future of the owners, their employees, brands and

reputation within the local community are central to the deal.

It sounds simple, but 'we do what we say'. Not just following the wording of the agreement with a new funeral home, but sticking to the spirit of the agreement. That's just the start of establishing the concept of 'Your reputation is our reputation'.



“I can honestly say that our experience of becoming part of the Funeral Partners family has been overwhelmingly positive.”

Alison Lawson

J & D Lawson Funeral Directors, Kirkintilloch, Scotland

Securing the future of your business

We know that deciding to sell a well-loved business is a momentous decision and we appreciate that you'll want all the available options explained to you in full.

Even if a sale is not a consideration for you now, it's never too early to have an initial chat and understand your options and why now may be a great time to explore them.

For an informal, confidential conversation call:

**Find out more about us at
funeralpartners.co.uk/story**



**Free online
valuation tool**

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funeralpartners.co.uk/value



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