



WASHINGTON STATE
FUNERAL DIRECTORS ASSOCIATION

Dear Members of the WSFDA,

We have good news to share with you regarding the funds of the WA Master Trust. We realize the complexities of this matter took some time for us to sort through, and we greatly appreciate your patience.

ClearPoint received every physical and digital WA Master Trust file and document, which they retained and researched for more than 13 months. Their review concluded just under \$700 of underfunding, which was immediately paid by the WSFDA to reconcile the small shortfall. ClearPoint has recently confirmed that growth in the trust has been adequate to cover additional shortfalls, which they later discovered.

As of March 8, 2024, the WSFDA has terminated our affiliation with the WA Master Trust and have passed it along to the capable oversight and administration of ClearPoint. Their CEO, Ashlee Theising, authorized that “WSFDA shall have no further involvement nor any liability from the trust”.

This means that all communication regarding trust funds, both payments into the trust and withdraw of funds from the trust, will be directly with ClearPoint. WSFDA members still have access to use ClearPoint. The WA Master Trust is still available to use as you desire.

If you have any questions or concerns, please reach out to the ClearPoint Relationship Manager, Amor Abdihodzic, at 812-375-9566 (amor.abdihodzic@clearpointfederal.com) or the ClearPoint Trust Administrator, Jennifer Levine, at 812-213-8097 (jennifer.levine@clearpointfederal.com)

We hope that this is welcomed news as we move forward to focus our attention on the best that WSFDA has to offer. As your professional association, we are thankful for your membership, support, and what you do within the communities you serve.

My Best,

Jamin J. Mohler, CFSP

WSFDA President