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Insights | Funeral & Cemetery Trust

Our Team

By David Falconer, Senior Vice President, Funeral and Cemetery Trust Manager

TEAM. If you look up the definition of team in the Oxford dictionary, as a noun, it is two or more people working together. As a verb, it is coming together to achieve a common goal. In this issue of our newsletter, we are highlighting the team we have assembled to achieve the common goal of providing our clients with excellent service that will help each of them achieve their business objectives.

Over the past few months we have welcomed several new associates. Our new teammates possess specialized skills and serve as our experienced attorneys, investment operations specialists, and pre-need trust compliance and administration officers.

Our new associates join an established group dedicated 100% to our Funeral and Cemetery Trust clients. We are confident that we will continue to make Regions Funeral and Cemetery Trust group the national leader in Death Care Trustee services.

Houston Funeral Trust Team

Our Houston-based Funeral and Cemetery Trust team includes six account officers, five administrative support members, an investment portfolio manager, an attorney, a sales strategist, and a manager. Our group includes four associates with law degrees, a licensed funeral director, and a former death care insurance executive. We believe that having our associates working together in one location fosters better communication, learning, and consistent service for our clients.

Top from left: Mike Dietrich, Paul Gottlieb, Helena White-Moore, Charles Burrell, Monzella Love, Colin Ramsey, Joe Breda
Bottom from left: Sara Taheri, Kathy Crumbley, Eyal Shavitzky, Edith Cannon, David Falconer, Summer Bokhary, Jenny Dunagan
(not pictured Jack Stepanek)

Funeral and Cemetery Trust Contacts

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REGIONS
INSTITUTIONAL SERVICES

Associate Spotlight

Regions Funeral and Cemetery Trust Division welcomes the following new associates:

Charles Burrell

Charles serves as Vice President and Funeral Trust Relationship Consultant. He has more than 20 years of Death Care Trust Administration experience working for a large Death Care industry consolidator. His experience performing trust administration, accounting, and compliance from a funeral home/cemetery owner's perspective is very beneficial to his clients, as he understands "both ends" of the pre-need and cemetery trust business. Charles studied Mathematics at the University of Oklahoma. He and his wife are now empty nesters in Houston, as both of his children are following in his footsteps by attending school at the University of Oklahoma in Norman.

Mike Dietrich

Mike is a member of Regions Funeral and Cemetery Trust's Administrative Support Team. Mike was most recently at INVESCO, an investment and mutual fund company in Houston where he was a Fund Accountant. Prior to moving to Houston, Mike spent almost 10 years working for Lighthouse Investment Partners in Palm Beach Gardens, Florida, where his responsibilities included in-house fund accounting for managed accounts and managing all daily processes for numerous separate accounts. Mike has extensive experience working with specialty investments such as real estate investment trusts, private equity funds, and Long/Short investment strategies. Mike and his wife live in Houston; in his spare time, you can usually find him cooking up something delicious on his Green Egg.

Eyal Shavitzky

Eyal serves as Senior Vice President and Funeral Trust Relationship Consultant. His most recent experience includes working for an international bank in New York where he focused on serving large, complex financial clients. Prior to that, he worked for Israel's Ministry of Defense Mission to the U.S. where he oversaw the relationships with the various financial institutions serving the government. Eyal was a First Sergeant, Counter Terrorism in the Israeli Defense Forces, and has law degrees from both Israel and the U.S. He has an LL.M. from the Columbia University School of Law where he was named a Harlan Fiske Stone Scholar. Eyal and his wife have two preschool-age daughters, and most of their spare time is focused on building their new house in Houston.

Summer Bokhary

Summer serves as Vice President and Funeral and Cemetery Trust Legal Counsel. She is responsible for maintaining and continuously improving our clients' trust documents and monitoring state-specific pre-need and perpetual care trust law. Summer has a broad legal background with an emphasis in commercial transactions and regulatory compliance. She most recently worked at a Houston-based law firm with a focus on negotiating complex commercial transactions and developing effective compliance programs specifically tailored to the individual needs of businesses. Summer has experience working with large companies in the closing of several multi-million dollar merger and acquisition transactions, and has extensive experience counseling domestic and international companies on regulatory and compliance issues in industries ranging from energy to healthcare. Summer is a native Texan, growing up just south of Waco. She is a graduate of South Texas College of Law and a cum laude graduate of Texas A&M-Corpus Christi. Her weekends in Houston are spent playing guitar with her family.