INSTITUTE *for* PREPARING HEIRS®

THE GREAT WEALTH TRANSFER: Attracting, Engaging & Retaining Generational Families

HALLMARK PROGRAM FOR FINANCIAL ADVISORS

"I've been in the industry for 31 years, at two different firms, and this is the best training program I have ever attended."
– Carroll J., Senior Wealth Advisor

The next evolution of wealth management is underway with $1 trillion transferring each year – from one generation to the next.

- ***Differentiate*** your practice
- ***Build long-lasting client/family relationships***
- ***Attract*** new affluent client families
- ***Expand*** your strategic network beyond CPAs and attorneys

Institute f*or* Preparing Heirs® is the premier provider of current content and leading-edge tools for advisors who wish to serve the changing needs of affluent families.

WHY ATTENDING THIS HALLMARK PROGRAM IS IMPORTANT

Affluent families want more from their trusted advisors than financial advising and estate planning. They want an advisor who brings a broader understanding of family wealth, beyond the money. They want an advisor with the know-how, tools and resources to confidently and competently engage in inheritance conversations that unify the family.

WHAT THIS PROGRAM PREPARES YOU FOR:

- **Retain your best client families before, during, and after wealth transition**
- **Retain the assets after wealth transition:** The majority of *unprepared* families lose control of their assets and family cohesion.
- **Attract new affluent clients** from competitors who are not prepared to attract and retain them.

WHAT THIS PROGRAM OFFERS:

- ***New*** opportunities to fully participate in The Great Wealth Transfer and meet the changing needs of affluent families.
- ***New*** perspective on family wealth and the emerging role of women as family financial leaders.
- ***New*** tools for families to prepare heirs.
- ***New*** business-building tools for advisors to attract, engage and retain multigenerational families.
- World-class faculty of researchers, authors and thought leaders on topics relating to family dynamics and the impact on affluent families and their wealth.
- One-year membership to Institute for Preparing Heirs to access tools and resources.
- IMCA and CFP continuing education credits.

WHO SHOULD ATTEND:

- Financial advisors
- Estate planning attorneys
- Family office executives
- Other trusted advisors who work with affluent families

Attendees find great value in networking and sharing ideas with other high-level professionals who serve the affluent community.

READY TO ENROLL? Go to www.preparingheirs.com and download the Enrollment Form or call 626.389.8664 Mon.-Fri., 11 a.m. – 5 p.m. Pacific time

WHAT ADVISORS LEARN AND EXPERIENCE DURING AND AFTER THE TRAINING

BUSINESS BUILDING TOOLS

Advisors leave with a 12-month membership to the Institute's turnkey tools and marketing resources:

- Collection of Institute *for* Preparing Heirs® Books
- Whitepapers & Articles
- Series of Inheritance Conversation Checklists:
  - Wealth Transition
  - Family Financial Readiness
  - Family Philanthropy
  - Family Health Conversations
  - Getting the Most From Your Advisor (series)
- Presentations with Companion Workbooks:
  - For Families
  - For Non-Profits/Foundations
  - About Family Meetings
- Speakers Bureau for Client Events
- Marketing Resources (sample letters)
- Family Wealth Mission Builder
- Family Workbook

"The program was a real game changer for me."
**– Theresa W.
Wealth Advisor,
30-Year Career**

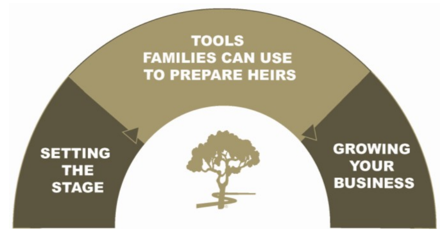
INVESTMENT TO ATTEND

$3,500 per advisor (*includes 12-month membership). Group discounts available.

INSTITUTE *for* PREPARING HEIRS

PROGRAM FORMAT REINFORCES LEARNING AND PRACTICAL APPLICATION

Program focus is *entirely* on the non-financial topics that serve as the *new* conversations advisors will be equipped to have with affluent families about preparing heirs for a successful generational transfer of assets. Advisors follow a clear pathway of discovery and learning that leads to making strong and lasting connections with multi-generations of affluent. To reinforce and apply the learning, facilitators lead small group practice management sessions, held between sessions. Following the program, facilitators hold three monthly small group calls to follow up on training objectives.



3 STAGES OF TRANSFORMATIONAL LEARNING

PROGRAM SESSIONS:

SETTING THE STAGE

MIXING OF FOUR GENERATIONS: A look at the common drivers of four generations and what's important for advisors to know about each.

FAMILY BRIEFING: Learn how family dynamics play a critical role in the single biggest risk a family could ever face – transferring wealth to heirs.

THE JOYS AND DILEMMAS OF WEALTH: Findings research, funded by The Gates Foundation, that highlights the aspirations of UHNW. Presented by the architect of the study.

ATTRACTING, ENGAGING & RETAINING HNW GENERATIONAL FAMILIES: Trusted family advisors not only manage assets, but also help families to prepare for a successful wealth transfer.

EMERGING ROLE FOR WOMEN: Learn why HNW women represent one of the most significant growth opportunities for advisors.

TOOLS TO PREPARE HEIRS

THE INHERITANCE CONVERSATION: Easy topics that families can use to prepare heirs.

PHILANTHROPY: Learn how "giving" encourages family cohesion, instills family values, and teaches financial responsibility.

FAMILY WEALTH MISSION BUILDER: Family tool that helps identify and prioritize the family's shared values, the first step in reducing post-transition discord.

FAMILY REPORT: Discovery tool for families to identify areas of potential post-wealth transition risk.

FAMILY MEETINGS: Learn how family meetings, when properly conducted, build trust, communication, and cohesion within families.

FAMILY WEALTH-HEALTH CONNECTION: The important role of the trusted family advisor.

GROWING YOUR BUSINESS

LISTENING TO THE EXPERTS: Current research findings, presented by the author, on what families value most in their trusted advisor relationship.

BUSINESS-BUILDING TOOLS: How to access the Institute for Preparing Heirs toolkit.

BUSINESS-BUILDING PLAN: How to use the Institute's toolkit as a part of your business plan.

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