The Great Wealth Transfer™

Engaging & Retaining HNW Generational Families

Annual Hallmark Workshop For Wealth Advisors

Sunday June 5 – Tuesday, June 7, 2016
Pepperdine University Malibu, California

INSTITUTE *for* PREPARING HEIRS

Attending This Workshop Is A Game Changer

The next evolution of wealth management is underway with $1 trillion transferring each year – from one generation to the next. Affluent families want more from their advisors beyond investment management and estate planning. They want a Trusted *Family* Advisor™ who works with their entire family and helps them prepare for a successful wealth transfer.

This Workshop Offers:

- ***New* opportunities for advisors** to meet the changing needs of generational families
- ***New* research** on the types of generational wealth transfers occurring today
- ***New* tools advisors can offer** families to prepare their heirs
- ***New* business-building tools** advisors can use to engage and retain multigenerational families

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.

Our Workshop Led By A World-Class Faculty

Powerful Results:

- **Differentiate** your practice from your peers
- **Strengthen** and build long-lasting relationships with your entire client families: grandparents, parents, children, grandchildren and their spouses
- **Engage** new affluent families as clients
- **Expand** your network beyond CPAs and attorneys

About Institute *for* Preparing Heirs®

Founded in 2009, Institute *for* Preparing Heirs has become the financial industry's top independent generational wealth transfer training resource for advisors, providing current content, new research, and leading-edge tools for advisors who wish to serve the changing needs of affluent families.

About The Institute's Faculty

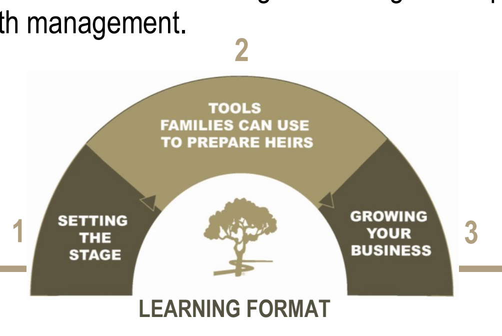
Includes researchers, authors, and thought leaders on the topic of generational wealth transfer. (Meet our faculty at: preparingheirs.com)

Proven Learning Format

SEGMENT **1 Sets The Stage For Today's Advisors:**
Advisors learn why clients' needs are changing and how they can take their practices to the next level of The Trusted *Family* Advisor – One whose client is now the entire family and includes the future success of their children.

SEGMENT **2 Introduces Tools Families Can Use to Prepare Their Heirs:**
Advisors learn about time-tested tools and how to integrate these into their advisory practices. Tools advisors can use to help the entire family prepare for a successful transition of wealth.

SEGMENT **3 Delivers Business Builder Opportunities:**
The largest wealth transfer in history is underway and offers advisors who are prepared, one of the most exciting business growth opportunities in the history of wealth management.



"I will be implementing what I have learned in my practice, and believe it will help increase retention and attract higher net worth prospects!"

– Kathy W.
Managing Director, Wealth Advisor

Taking The Next Step

For more details, contact:

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Visit Our Website at: preparingheirs.com

Location

Villa Graziadio
Pepperdine University
24255 Pacific Coast Highway
Malibu, California 90263

Date

Sunday evening June 5 through
Tuesday afternoon, June 7, 2016

Earn IMCA and CFP Board CE Credits