

Link Between Health Management and Wealth Planning to Be Featured at Institute for Preparing Heirs® Training for Family Wealth Advisors

An unexpected health issue can derail even the most well thought-out estate plan and wealth management strategy. Dr. Carol J. Scott, a leading health and wellness expert, and faculty member of the Institute for Preparing Heirs (IPH), will address the “Impact Of Health On Wealth Planning In Shaping Family Priorities” at IPH’s wealth advisor training program.

Pasadena, CA ([PRWEB](#)) August 03, 2013 -- “Impact Of Health On Wealth Planning In Shaping Family Priorities” will be a featured topic at the [Institute for Preparing Heirs®](#) (IPH) hallmark wealth advisor professional training, "[The Great Wealth Transfer: Attracting, Engaging & Retaining MultiGenerational Families](#)", Nov. 3-5, 2013, at Pepperdine University in Malibu, Ca. This training is open to financial advisors, estate attorneys, family office executives, CPA’s and other professionals who serve high-net-worth individuals and families.

The IPH training program offers tools, resources and knowledge for advisors to position their practices at the forefront of the next big “sea change” in wealth management—how to deliver advice to high-net-worth families that bridges the gap between preparing assets for heirs and preparing heirs for assets.

The [training faculty](#) includes experts and thought-leaders on topics of non-financial issues surrounding generational wealth transfer, and the link between family dynamics and successful wealth transfer.

“The Impact Of Health On Wealth Planning In Shaping Family Priorities” session will be led by IPH faculty member Dr. Carol J. Scott, M.D., M.S.Ed, F.A.C.E.P., a practicing emergency physician and wellness consultant, and author of the book, *The CEO Model of Wellness: Managing your Health Like a Fortune 500 Company*.

Dr. Scott's session addresses why advisors and their clients should include health and wellness management as a part of the family’s estate plan. According to Dr. Scott, an unexpected health issue can derail even the most well thought-out estate plan and wealth management strategy, often leading to the erosion of family assets. She will focus on the value to families of having a unified vision for family wellness and the role of the advisor.

The benefits for advisors attending “The Great Wealth Transfer” training include:

- Deepening relationships with entire client families before wealth transfers
- Attracting new affluent individuals and families as clients
- Expanding the advisor’s professional network with other trusted advisors who work with affluent individuals and families
- Differentiating the advisor as a leader in bringing a new perspective on wealth to affluent individuals, families and other professional advisors

The training format combines lecture with practice management small group learning led by skilled facilitators. The format is designed to encourage peer group discussion of new ideas and strategies, and to develop an action plan tailored specifically for the advisor’s practice. Takeaways include actions that can be immediately used by the advisor, along with exclusive access to conversation-starter tools developed by IPH.

The training teaches advisors about:

- Opportunities and challenges of participating in “The Great Wealth Transfer”
- Why family dynamics play a greater role in successful wealth transfer than previously understood
- Benefits of initiating conversations with clients, beyond the money, on topics such as how to use philanthropy to teach financial responsibility, the value of family meetings, and why families need a mission statement for their wealth
- How to use conversation-starter tools to meaningfully engage the entire family in non-financial discussions about wealth transfer
- Actions families can take before wealth transfer and the role of the advisor
- Contemporary research on what families value most in the client-advisor relationship

IPH is headquartered in Pasadena, CA. Its mission is to bring advisors and families closer together by providing advisors with training, tools, and on-going support to prepare families for successful generational wealth transfer.

For information on “The Great Wealth Transfer” advisor training, call IPH at (626) 389-8664 or email [contact\(at\)preparingheirs\(dot\)com](mailto:contact(at)preparingheirs(dot)com). Financial advisors earn IMCA and CFP continuing education credits for attending. [Early enrollment](#) and group discounts available.

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