Institute for Preparing Heirs® Announces Generational Wealth Transfer Planning Workshop For Wealth Advisors

This annual workshop has a proven learning format that addresses the business risks and growth opportunities of the largest generational wealth transfer currently underway in the U.S., its impact on families and their wealth advisors, and actions advisors can take to help families prepare for wealth transfer and keep the kids as clients.

Pasadena, California (PRWEB) March 31, 2016 -- The Institute for Preparing Heirs® (IPH) will hold its Annual Wealth Advisor Workshop, "The Great Wealth Transfer: Engaging & Retaining High Net Worth Generational Families," June 5-7, 2016, at Pepperdine University in Malibu, Ca.

This workshop offers new ideas, new tools and new resources to help wealth advisors take their practices to the next level as the Trusted Family Advisor—one whose client is now the entire family and includes the future success of their children.

According to Vic Preisser, Institute for Preparing Heirs Founding Director and co-author of Preparing Heirs and Family Meetings, “Excellent money management and estate planning will no longer be the differentiator it has been in the past with affluent clients. Clients want an advisor who brings a broader definition of family wealth to the client/advisor relationship and is able to address the non-financial topics that are critical to successful wealth transfer.”

Developed exclusively for financial advisors, family office executives, estate planning attorneys, and other trusted advisors who work with affluent families, this one-of-a-kind workshop is led by a world-class faculty of researchers, authors and thought leaders on non-financial topics related to family dynamics and generational wealth transfer. Workshop topics address:

• New opportunities for advisors to take their practices to the next level as the Trusted Family Advisor
• New research on non-traditional generational wealth transfers occurring today
• Family financial leadership as an emerging role for women
• The role of family dynamics in successful wealth transfers
• How to introduce family meetings as a forum for unifying inheritance conversations
• How family giving programs can engage the entire family and provide financial mentoring to prepare heirs
• The family wealth-health connection and the new role of a family health advocate
• New business-building tools advisors can use to engage generational families

“We’re in one of the most exciting business-building opportunities in the history of wealth management,” Preisser said. “While trillions of dollars in assets are transferring from one generation to the next over the next several decades, an advisor’s ability to retain the heirs as clients will require generational wealth transfer training to learn how to make a genuine connection with the entire family's adult children before the assets transfer.”

This workshop includes a one-year membership to Institute for Preparing Heirs with access to the Institute’s proprietary tools and resources to help grow the advisor’s practice. In addition, financial advisors earn IMCA and CFP Board continuing education credits for attending.

To enroll, call Institute for Preparing Heirs at (626) 389-8664 or email contact(at)preparingheirs(dot)com. Visit our website at www.preparingheirs.com for more information.

ABOUT INSTITUTE FOR PREPARING HEIRS®
Founded in 2009, Institute for Preparing Heirs® is 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.

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