INSTITUTE *for* PREPARING HEIRS®

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

HALLMARK PROGRAM FOR FINANCIAL ADVISORS

"After 25 years as a wealth advisor, this training has changed my priorities. My client is now the entire family and my focus as their trusted family advisor includes the future success of the children."

– Diane D., Wealth Advisor

The next evolution of wealth management is underway with $1 trillion transferring each year – from one generation to the next. Now is the time to take your practice to the next level and become the trusted *family* advisor.

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

Institute *for* 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 TO THE FUTURE OF YOUR PRACTICE

As wealth transfer becomes a reality for many families, they need more from their trusted advisors beyond managing money or creating estate plans. Clients want you to work with their entire family, and they want you to educate their kids. This hallmark program takes you to the next level by becoming a trusted *family* advisor.

WHAT THIS HALLMARK PROGRAM PREPARES YOU FOR IN YOUR PROFESSION:

- **Retain your best client families:** Over 90% of heirs find a new advisor after receiving an inheritance
- **Retain the assets:** In 1 to 3 generations after wealth transfers, the majority of *unprepared* families lose control of their assets and family cohesion
- **Capture new affluent clients** from competitors who are not prepared to attract and retain them

WHAT THE GREAT WEALTH TRANSFER HALLMARK PROGRAM OFFERS:

- ***New*** opportunities for advisors to prepare to fully participate in The Great Wealth Transfer and meet the changing needs of affluent families
- ***New*** tools families can use to prepare heirs
- ***New*** business-building tools for advisors to attract, engage and retain multigenerational families
- A world-class faculty of researchers, authors, and thought-leaders on topics relating to family dynamics and the non-financial issues impacting wealth transfers in affluent families
- One-year membership to Institute for Preparing Heirs to access tools and resources
- IMCA and CFP continuing education credits

WHO SHOULD ATTEND THIS HALLMARK PROGRAM:

- 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 *for* Preparing Heirs®*. Membership includes access 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
  - Financial Readiness Checklist
  - Family Philanthropy
  - Fortified Family Health Conversations
- Family Meeting Resources
- The Family Report Assessment Tool
- Briefing PowerPoint Presentations with Companion Workbooks:
  - For Families
  - For Non-Profits/Foundations
  - For Affluent Women
- Speakers Bureau for Client Events
- Marketing Resources (sample letters)
- Ongoing Education Webinars
- Family Wealth Mission Builder
- Guidebook to Family Inheritance Conversations

> *"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

INVESTMENT TO ATTEND

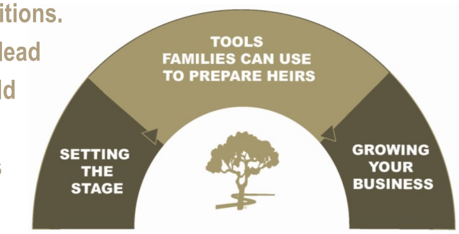
$3,500 per advisor (*includes 12-month membership). Group discounts available.

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 the challenges and opportunities of 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 families —before, during, and after wealth transitions.

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: Your Estate Plan is in Place, But is Your Family Prepared? 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 from contemporary research, funded by The Gates Foundation that highlights the aspirations of UHNW. Presented by the architect of the study.

GOING BEYOND THE MONEY – BECOMING THE TRUSTED FAMILY ADVISOR: Trusted family advisors not only manage assets, but also help families to prepare for a successful wealth transfer.

TOOLS TO PREPARE HEIRS

THE INHERITANCE CONVERSATION: Easy conversation 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: Assessment tool for families to discover areas of potential post-wealth transition risk

FAMILY MEETINGS: Learn how family meetings, when properly conducted, build trust, communication, and cohesion within families; and the role of the advisor

FAMILY WEALTH-HEALTH CONNECTION: The health-wealth connection and 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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