

Institute for Preparing Heirs™

Membership for Professional Advisors



The Mission for Institute for Preparing Heirs

We teach advisors how to start the conversation with families of wealth about the successful transfer of wealth to their next generation and provide resources and tools to support the relationship.

Why Join the Institute?

The great wealth transfer has begun. For the next 50 years, \$1 trillion will transfer *every year* to the next generation. Your membership to the Institute for Preparing Heirs gives you access to tools, resources, research, professional development programs, and the know how to genuinely and meaningfully connect with your client's (and prospective client's) children *before, during, and after* estate transfer.

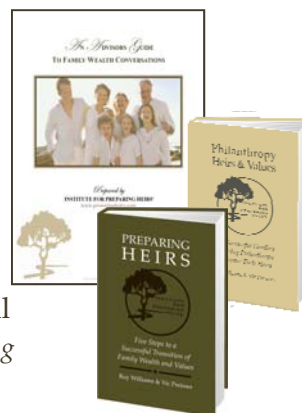
Who Would Benefit from Membership?

Membership is open to any wealth advisor who works with high net worth families and individuals and wants a proven process to start the conversation families want to have—*how to prepare for a successful and lasting wealth transfer*. Members include:

- Financial wealth advisors
- Estate planning attorneys
- CPA's
- Other wealth advisors who serve affluent families and individuals
- Family office executives
- Insurance executives
- Family business consultants

What Your Membership Includes:

- **Easy online access** to the Institute's family wealth conversation starters, proprietary family wealth assessment tools and automated reporting, library of articles on wealth transition planning, sample marketing letters and more
- **Priority access to the Institute's speakers** on family dynamics and wealth transfer
- **Access to ordering the Institute's marketing materials**
- **Discount pricing on the Institute's books**
- **Quarterly Family Wealth Newsletter** for clients, prospective clients and centers of influence
- **Discount pricing** for the Institute's hallmark two-day professional development program: *The Great Wealth Transfer: Attracting & Retaining MultiGenerational Families of Wealth*



For more information, call: 626.389.8664 or email: contact@preparingheirs.com
Institute for Preparing Heirs 301 North Lake Avenue, Suite 810, Pasadena, CA 91101

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The Many Benefits of Membership

Speakers Bureau

Featured speakers include Vic Preisser and Roy Williams, co-authors of highly acclaimed books, *Preparing Heirs* and *Philanthropy Heirs & Values*. For decades, they have been at the forefront of successfully coaching affluent families through the process of transferring wealth to the next generation.

Presentations are tailored to your audience, whether it's a client family event, briefing to your most important centers of influence (CPAs or estate planning attorneys), or an intimate family gathering in a client's home.

One-hour presentation topics:

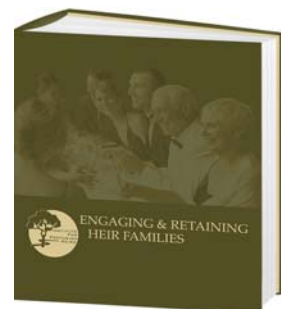
- **For successful families, their CPAs and attorneys:**
Your Estate Plan is in Place, but is Your Family Prepared?
- **For professional advisors:**
Family Dynamics & Successful Wealth Transfer
- **For foundations/nonprofits:**
Family Philanthropy & Estate Transitions: A Hidden Pathway to Heir Success



Priority access and discount pricing. Includes 30 copies of *Preparing Heirs* book plus custom book label with your contact information. (Pricing available upon request.)

Professional Development Program

Members receive a tuition discount for enrollment in the Institute's hallmark 2-day professional development program, *The Great Wealth Transfer: Attracting & Retaining MultiGenerational Families of Wealth*. This one-of-a-kind two-day class goes beyond simply creating awareness of wealth transfer challenges in families. Advisors learn a proven process for guiding families through wealth transition, what's behind most family failures post-transition, how to effectively use conversation-starting tools, how to assess a family's readiness for wealth transfer, what actions families to take today, and much more.



How to Join

Annual membership dues are \$395. For information on how to join, call the Institute for Preparing Heirs at 626.389.8664, or email: contact@preparingheirs.com

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