

The Great Wealth Transfer: Attracting & Retaining MultiGenerational Families of Wealth



APPLICATION FOR ENROLLMENT

Thank you for your interest in attending our two-day professional development program on **The Great Wealth Transfer: Attracting & Retaining MultiGenerational Families of Wealth** presented by the Institute for Preparing Heirs. This class is only open to professional advisors. Each class is limited to 25 advisors. Please complete this brief Application for Enrollment and return it to us by email or fax as soon as possible.

This information on the Application enables the Institute to best ensure that our program goals and objectives are a good fit with you and your business practice.

How did you hear about this training? _____

YOUR INFORMATION

First & Last Name: _____

Title & Firm Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Firm Website: _____

Email: _____

Phone (Direct): _____ Fax: _____

Email: _____

YOUR BUSINESS PROFILE

How long have you been in business? _____

List of professional credentials: _____

Are you part of a team? Yes No How many members are on your team? _____

How many client households do you serve? Below 250 Above 250

Average client net worth: \$1-5MM \$5-20MM \$20MM+ \$50MM+

Geographic area(s) for clientele served: _____

Continued on back

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APPLICATION FOR ENROLLMENT *(continued)*

Please answer the following questions:

1. Why are you most interested in attending this class? Please rate each of the following class objectives and goals on a scale from 1-5, with 1 being most important to you.

_____ *To Differentiate* your practice from your peers

_____ *To Deepen* relationships with your entire client family base (grandparents, parents, children, grandchildren and their spouses) before the estate transitions

_____ *To Cultivate* new relationships with successful families planning to transition wealth

_____ *To Expand* your network of professional advisors who work with successful families: financial advisors, estate attorneys, CPA's, trust officers, investment bankers, insurance specialists, appraisers and family coaches

_____ *To Prepare* a tailored marketing program that will position you as a resource for high net worth families

_____ *To Build and Retain* multi-generational relationships with wealthy families

Other objectives and goals in taking this class: _____

2. Describe your clientele: _____

3. What differentiates your practice? What is your (team's) mission statement? _____

4. Describe the events you have offered your clientele: _____

5. What is your experience in public speaking? Preferred size of group? Please describe your role in public speaking and topics and/or events where you are the main speaker: _____

6. Please explain how you currently market your practice (i.e. client events, newsletter, direct mail or email campaign):

Email to: ggough@preparingheirs.com or Fax to: 888.506.4189

Upon acceptance to the certification training, you will receive a confirmation letter with further details.