



The Great Wealth Transfer

Attracting & Retaining MultiGenerational Families of Wealth™

A PROFESSIONAL DEVELOPMENT PROGRAM

MARCH 11 – 13, 2012

The Graziadio Executive Center

Pepperdine University – Malibu, California





Become fluent in conversations on successful wealth transfers.

We teach advisors how to open conversations with affluent families on the successful transfer of wealth to their next generation.

– Mission of Institute for Preparing Heirs

ABOUT THE INSTITUTE FOR PREPARING HEIRS

The Institute grew from over 40 years of field work by The Williams Group, who for decades has successfully coached high net worth families through their wealth transition. The Institute adopted the central message of The Williams Group – “...for wealth transfers to truly succeed, heirs must be prepared” – and translated it into training and tools for financial advisors, estate planners, and other professionals working with affluent individuals and families.

INTRODUCTION TO OUR PROGRAM

Participants will learn about the risks facing successful wealth transfers, and how to translate this knowledge into meaningful conversations with wealth holders and their family members...before, during, and after wealth transfer. They will also receive access to, and instruction on, proprietary tools available nowhere else.

Participants will leave this program with:

- A deep understanding of how to engage in these conversations
- A solid foundation of supportive knowledge from which to draw
- A unique perspective that will differentiate their practice
- A set of skills, tools, and resources to offer individuals and families



THE GREAT WEALTH TRANSFER HAS BEGUN

Over the next 40 years, \$41 to \$136 trillion in wealth will transfer from one generation to the next. That’s a staggering more than \$1 trillion each year! At the same time, 90% of inheritors change advisors upon receiving their inheritance. And, the chances of the heirs retaining control of the assets and family harmony are only 30%. This Professional Development Program addresses the key factors in successful wealth transfer, the role of family dynamics, and the role of the advisor before, during, and after the estate transition.

ADVISOR SELF-CHECKLIST

How well prepared are you to participate in the great wealth transfer?

Advisor Checklist		
Institute for Preparing Heirs		
	Statement	Yes/No
1.	I am aware that the vast majority of estates <i>fail to transfer</i> successfully to the next generation	
2.	I am aware that <i>90+% of heirs change advisors</i> upon receiving their inheritance	
3.	I am aware that my best client families are more concerned about the <i>effect</i> wealth will have on their children than the <i>amount</i> of wealth that will be transferred	
4.	I know who my best clients <i>entire family</i> are: grandparents, parents, children, grandchildren, and their spouses	
5.	I am comfortable <i>starting the conversation</i> about family dynamics and wealth transfer with my clients and prospective clients	
6.	I know how to <i>assess the wealth transition impacts</i> for my best client families	
7.	I am familiar with “best practices” of actions a family can take and <i>know the proper resources to refer</i>	
8.	I currently have in place a process and marketing tools to <i>increase the number of affluent families</i> I have as clients	
9.	My <i>centers of influence refer</i> their affluent families who are planning their wealth transfer	
10.	I have a <i>business plan for my practice</i> that includes engaging, retaining and attracting multigenerational families of wealth	

(If you answered “no” to three or more statements, you should consider attending this Professional Development Program.)



TRAINING FOCUS

The program focuses on developing a deep understanding of how family dynamics play a critical role in the single biggest risk an affluent family will ever face...transferring wealth to inheritors.

THE 3 A'S TO SUCCESSFUL WEALTH TRANSFER PLANNING

AWARENESS ASSESSMENT ACTION

STEP 1 – AWARENESS

The first step is knowing what needs to change and how. Studies show that internal family dynamics underlie the great majority of estate failures, not professional advice. This session includes presentation materials and discussions on what advisors can do to initiate this important conversation with affluent individuals and families.

STEP 2 – ASSESSMENT

Advisors will learn how to start conversations with families about whether they are at risk and why. Learn about the Institute's proprietary tools (10-question Family Wealth Transition Checklist and 24-question Family Self-Assessment) that measure key areas impacting successful wealth transfers to the next generation.

STEP 3 – ACTION

Participants will learn how to suggest various tools, actions, and further resources available to families based on the results of their assessments. Participants will review actions a family can take on their own, and actions a family can take with their advisor. For families who want more, participants will learn about additional resources available.

“This program is an amazing opportunity to differentiate my practice from others who market to the same affluent clientele.”

– Senior Vice President,
Financial Advisor

PROGRAM FACULTY & VISITING FACULTY

Institute for Preparing Heirs is proud to present a faculty of international recognized authors and family coaches, and distinguished researchers and educators.



**Vic Preisser, Founding Director
Institute for Preparing Heirs**

Vic is co-author of *Preparing Heirs* and *Philanthropy Heirs & Values*, and a frequent speaker on the challenges and opportunities facing affluent families and their advisors when transferring wealth to inheritors. As Managing Director of The Williams Group, he has extensive experience in mentoring heirs on career and life

choices. In addition, he brings 40 years in leadership positions in business, government, and education. Vic holds BS (summa cum laude) and MBA degrees, both from Stanford University.



**Roy Williams
Founding Director, Institute for Preparing Heirs
Founder of The Williams Group**

Roy Williams is the acknowledged “dean” of post-estate transition research and coaching. He is a pioneer in helping high net worth families meet the challenges of transferring wealth from one generation to the next. He is co-author of *Preparing Heirs* and *Philanthropy,*

Heirs & Values and author of *For the Love of Money*. In 1994, Roy participated in the largest research project to date on family wealth transfers, interviewing more than 2,000 families.

**Robert Kenny Ed.D.,
North Bridge Advisory Group**

Boston College Center on Wealth and Philanthropy

Bob Kenny is a Senior Advisor at the Boston College Center on Wealth and Philanthropy. He brings 30 years of practical and research experience in development counseling and educational psychology. Through his work as a partner at the North Bridge Advisory Group and as the Executive Director of More Than Money, Bob understands the complex emotional quandaries and interpersonal dilemmas faced by affluent families.



**Karen Weisgerber, Ph.D.,
North Bridge Advisory Group**

Boston College Center on Wealth and Philanthropy

Karen Weisgerber is a Senior Advisor at the Boston College Center on Wealth and Philanthropy and a partner at the North Bridge Advisory Group. She brings an expertise with inheritors that has developed over 20 years as a licensed psychologist in private practice, along with consulting, research, and teaching. She frequently consults with families around the multi-faceted issues that present themselves with the distribution of wealth among siblings and across generations.



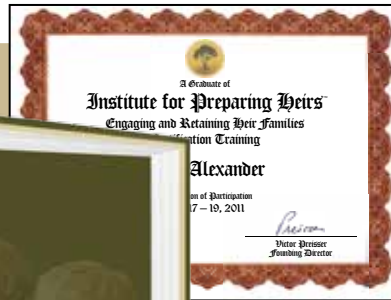
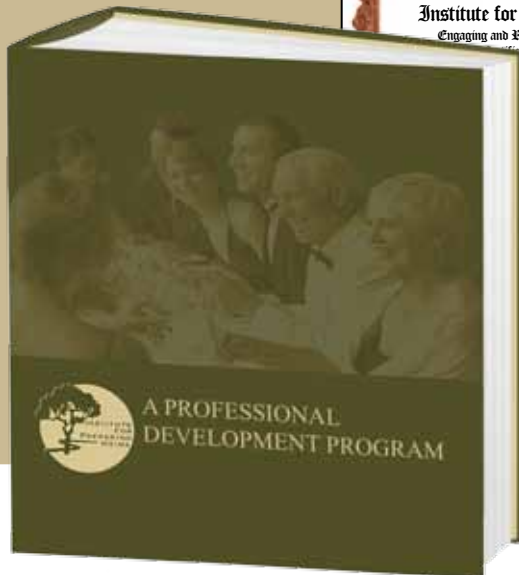
The Great Wealth Transfer

A PROFESSIONAL DEVELOPMENT PROGRAM



Professional advisors have long sensed the need for practical, data-based guidance and tools designed for affluent families and individuals planning to transfer wealth to the next generation. For the first time you can bring the knowledge and tools back to your practice and immediately differentiate yourself.

You will be a valuable resource for families and their current advisory team...a source of information, tools, and guidance for heir families as they prepare for the responsibilities of managing wealth and family harmony when their parents can no longer be present as a "safety net."



You should attend if you are a:

- Financial advisor, wealth management
- Estate planning attorney
- CPA
- Family office executive
- Insurance executive
- Family business consultant

Or other professional advisor serving affluent families and individuals.

TWO-DAY PROFESSIONAL DEVELOPMENT PROGRAM

This one-of-a-kind two-day program 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 can take today, and much more.

BENEFITS OF ATTENDING

- Differentiate your practice from your peers
- Deepen relationships with your entire client families: grandparents, parents, children, grandchildren and their spouses, before the estate transitions
- Cultivate new relationships with affluent families planning to transition wealth
- 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

TWO-DAY PROGRAM INCLUDES

ONE-YEAR INSTITUTE MEMBERSHIP:

- **Exclusive Institute for Preparing Heirs Marketing Toolkit**
- **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 training: *The Great Wealth Transfer: Attracting & Retaining MultiGenerational Families of Wealth*

Program Fee: *\$3,000

***Ask about the early registration discount effective through Jan. 31, 2012**

Lodging (not included in the cost of tuition) is available at The Graziadio Executive Center at Pepperdine University – Malibu, California.