ENGAGING & RETAINING HEIR FAMILIES™ TRAINING

Institute For Preparing Heirs

July 12-13, 2010 or August 9-10, 2010 ~ Pepperdine University ~ Malibu, California

Build stronger ties with your entire client family
Cultivate new high net worth families as clients

For the first time, the Institute for Preparing Heirs is presenting a two-day certification training on *"Engaging & Retaining Heir Families™"*. Open only to professional advisors, this one-of-a-kind program is based on the life-long work of Roy Williams and Vic Preisser, acclaimed authors and pioneers in coaching high net worth families for over 45 years. This program goes beyond simply creating awareness of wealth transition challenges facing today's heir families… it offers proprietary research, analytical tools, marketing support and materials, and much more!

"Engaging & Retaining Heir Families™" training is for professional advisors who want to:

- **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 successful 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
- **Prepare** a tailored Marketing Program that will position you as a resource for high net worth families

Or If: You simply want to deepen your knowledge about how to build and retain multi-generational relationships with wealthy families.

Today's Challenges

How to connect with affluent families before their estate transitions to address these critical factors:

- 70% of families lose control of their assets and family unity following the transition of their estate to the next generation
- Over 90% of heirs promptly change advisors upon receiving their inheritance

Today's Opportunities

We are experiencing the largest inter-generational wealth transfer in history:

- About 20,000 US estates over $20 million are currently transitioning each year
- $1 trillion in assets will transfer each year for the next 50 years

"Engaging & Retaining Heir Families™" is the only program that trains, equips and certifies advisors to take advantage of today's opportunities by addressing traditional wealth management's "missing link" — preparing heir families for the successful transition of wealth.

Advisors learn from leaders in the field of wealth transition—Roy Williams, Vic Preisser and their team of world-class family coaches whose clients are among North America's most elite families—and marketing consultants who developed and tested the Institute's exclusive marketing toolkit.

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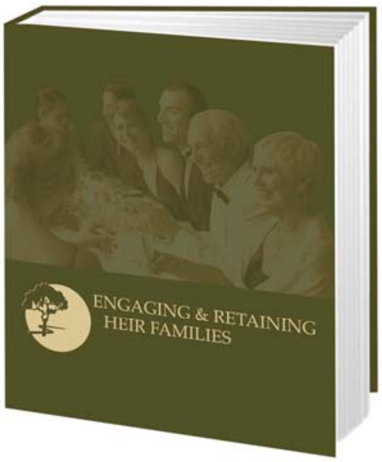
Overview of Training Structure



Be among the first advisors trained and certified in the **"Engaging & Retaining Heir Families™"** program by attending one of the two-day classes being offered this summer on July 12-13 or August 9-10, 2010. In order to offer geographic exclusivity for a period of time, attendance for each class is limited to 25 advisors (if a class is full, we can wait list you for the next Institute for Preparing Heirs class).

Don't wait to enroll! Candidates for our Certification Program are required to submit the Enrollment Application and must meet certain criteria for acceptance. This criteria ensures the candidate's commitment to the program objectives and goals.

Return the enclosed reply card, call us, or email us today for an Enrollment Application.

Training Structure

The class format is a multi-blended learning experience that emphasizes the conceptual, experiential, reflective and active experimentation and implementation with feedback provided by skilled family coach instructors.

The learning process is based on a case study and requires that participants demonstrate proficiency in discovery, conversations and assessment of wealth transition concerns. This method will enable participants to:

- Understand the relationship between family dynamics and wealth transfer
- Learn to assess the degree of risk that families face during wealth transfer
- Develop strong multi-generational relationships with the family
- Learn to deliver a Private Briefing and utilize the Institute's family assessment tools
- Become knowledgeable about the services and solutions available for families transferring wealth

Participants will develop a Tailored Marketing Calendar utilizing the Institute's turnkey marketing toolkit. You can differentiate your practice from other advisors in your local community by becoming a wealth transfer planning resource for successful families and their other trusted advisors.

Case Study

An Enlightened Advisor's Journey Working with Wealthy Families

The basis of learning for the two-day class is built around a case study involving an advisor and a successful family. In it, the parents had become increasingly concerned about the impact of wealth on their children and grandchildren after the estate transfer. The case study begins after the advisor attends the "Engaging & Retaining Heir Families™" training class.

You'll learn step by step how the advisor uses the training, tools and marketing to connect with the family and guide them through the wealth transfer process. You'll also learn the actions taken by the advisor and the family that resulted in the successful transfer of not only the estate's value but the family's values as well.

Tuition

Introductory price of $5,950

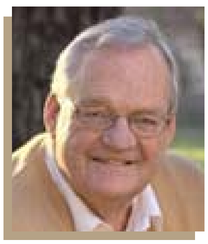
(A savings off the regular price of $9,950, effective for classes beginning in September 2010.)

This includes your Advisor Certification for training, access to the Institute's turnkey marketing toolkit that includes the new Apple iPad with easy-to-use family assessment tools, and training by our marketing consultants. **Also included is six months follow-up support**.

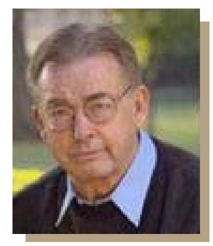
Lodging is available at The Graziadio Executive Center at Pepperdine University located in the hills of Malibu, California, overlooking the Pacific Ocean.

For nearly a half century, Roy Williams has been at the forefront in coaching successful families through the often tumultuous process of transferring wealth to the next generation. Along with Vic Preisser, they have written multiple books on preparing heirs, drawing from their vast wealth of knowledge and experience, groundbreaking family research, and strong sense of family values. Their time-tested approach to family wealth transfer has a remarkable success rate approaching 100%.

The Institute for Preparing Heirs is proud to present a faculty of internationally recognized family coaches and award-winning marketing consultants.



Roy Williams
Founding Director, Institute for Preparing Heirs , Founder of The Williams Group
Roy is the acknowledged "Dean" of post-transition research and coaching. Roy has more than 45 years experience coaching successful families through wealth transitions based on his study of 3,250 family estate transitions. He co-authored *Preparing Heirs* and *Philanthropy, Heirs & Values* and authored *For The Love of Money*.



Vic Preisser
Founding Director, Institute for Preparing Heirs, Managing Director of The Williams Group
Vic is Roy's partner and co-author of *Preparing Heirs* and *Philanthropy, Heirs & Values*. He specializes in mentoring heirs and provides training to institutions for work with their high net worth clients. He has 40 years experience with leadership in business, government and education.

Family Coaches

Dr. Peter Yaholkovsky has 25 years of experience as a Senior Coach in helping families and individuals to master the foundations of communication that build authentic trust. Prior to coaching, Peter practiced Internal Medicine as a Board Certified Internist.

Sue Staker has 15 years of experience preparing heirs for the responsibility and purpose of wealth, especially in assisting them to choose and prepare for their future roles.

Emily Bouchard brings 25 years of experience as a specialist in blended families working with children, individuals, couples and families to overcome their personal challenges.

Dan Haygeman has 25 years experience coaching individuals, families and corporate teams helping them work beyond the constraints that occur when important conversations are withheld.

Joel Kimmel has 35 years experience, specializing in helping families to develop efficient, powerful and effective communication. He works with families and individuals to build honest and authentic relationships in their lives.

Marketing Consultants

Carol Sherman, Founding Director of the Institute for Preparing Heirs, has 25 years experience as a results-driven, award-winning marketer with strong writing, communications, creative and strategic planning skills.

Emily Miller, Creative Director for the Institute for Preparing Heirs, has over 10 years of experience in marketing, sales and graphic design. She also worked as a financial advisor for a national brokerage firm where she excelled at promoting the importance of philanthropic endeavors and next generation education.

ENGAGING & RETAINING HEIR FAMILIES™ TRAINING

INSTITUTE FOR PREPARING HEIRS

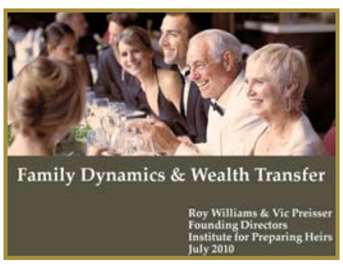
A PRIVATE BRIEFING

The pathway to building your practice and increasing visibility in your community

The "Engaging & Retaining Heir Families™" class trains and certifies advisors to deliver the Institute's 45-minute Private Briefing. A Private Briefing is a "by invitation only" event designed to start the conversation in high net worth families that few are having—are heirs prepared to receive and manage wealth? Will the estate and family unity survive in the next generation?

A Private Briefing tells clients and prospective clients that you care, not only about the preservation of their family wealth, but also about the preservation of their family values and harmony.

- Make families **Aware** of the risks following estate transitions: 70% of families lose their assets and family harmony following the transition of the estate to the next generation
- Offer families tools to **Assess** how well prepared their heirs are to retain family harmony and assets
- Inform families of the **Action** they can take



Private Briefing PowerPoint presentations available for certified advisors:

- For Successful Families: "Your Estate Plan is in place, but are your Heirs Prepared?"
- For Professional Advisors: "Family Dynamics and Wealth Transfer"
- For Foundations and Non-Profits: "Family Philanthropy and Estate Transitions"

All presentations are NASBA approved nationally for CPE credit.

Who Would Benefit from a Private Briefing?

- **Successful Families**
- **Professional Advisors** who work with successful families: financial advisors, estate planning attorneys, CPA's, trust officers, investment bankers, insurance specialists, art appraisers, commercial realtors, family offices
- **Foundations, Non-Profits,** Local clubs and organizations, CPA societies, attorney groups, business owner groups and local private clubs

Marketing Your Private Briefing

A Private Briefing clearly establishes you as a resource for wealthy families and other trusted advisors in your community—advisors like yourself who are seeking a pathway to wealth transfer planning information for the benefit of *their* client families.

How you market your Private Briefings is just as important as the Private Briefing itself. Marketing is a powerful tool for differentiating your practice from other advisors in your local community.

Marketing Training

Advisors enrolled in the *"Engaging & Retaining Heir Families™"* class will learn to develop a Private Briefing marketing plan, using the toolkit materials. The marketing faculty includes the marketing consultants who designed, wrote and produced the Private Briefing marketing materials in your toolkit.

Advisors will learn:

- **To develop a month-by-month Private Briefing marketing plan,** using the toolkit materials
- **How to work with news media** to promote your Private Briefing and establish yourself as a "preparing heirs" subject matter expert
- **How to craft a press release** to garner "free" publicity for your Private Briefing

In addition, advisors will learn about ongoing marketing services available from the Institute.

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