Looking for an exciting new topic for your next client event?

INSTITUTE FOR PREPARING HEIRS

Consider Our Speakers Bureau

Featuring the authors of these highly acclaimed books:
Preparing Heirs and ***Philanthropy Heirs & Values***

This is a topic that high-net-worth families and their trusted advisors want to know more about.

WHY HOST A CLIENT EVENT ON PREPARING HEIRS?

The largest intergenerational wealth transfer is underway – $1 trillion, every year for the next 50 years, will pass from one generation to the next. Your ability, as a trusted advisor to high-net-worth families, to capture multigenerational wealth – requires that you genuinely connect with the family's adult children and grandchildren BEFORE the wealth transfer.

Preparing heirs for assets is the new differentiator for financial advisors.

TOPICS AVAILABLE FROM THE INSTITUTE

- **For Successful Families, their CPA and Estate Attorney:**
  Your Estate Plan is in Place, but are Your Heirs Prepared?
- **For Professional Advisors, CPA or attorney firms:**
  Family Dynamics & Wealth Transfer
- **For Foundations/Non-Profits:**
  Family Philanthropy & Estate Transitions: A Hidden Pathway to Heir Success

These topics present an eye-opening look at the single biggest risk a successful family will ever face…transferring wealth to heirs. Discover the role of family dynamics in wealth transfer. Learn why 70% of high-net-worth families break apart after the transfer of wealth to the next generation. Hear what families that stay intact post-wealth transition have in common and what meaningful action steps "at risk" families can take to beat the odds.

Custom invitations available

WHO WOULD BENEFIT BY ATTENDING

- Successful families and individuals, including adult children and their spouses (includes current client families and new high-net-worth families)
- Family business founders and their heirs
- Your network of professional advisors who work with successful families (CPA's, attorneys, and their clients)
- NASBA approved for CPE credit

CUSTOMIZED TO YOUR AUDIENCE

- One-hour educational presentation plus 30 minutes for questions
- Ideally suited for a breakfast or luncheon meeting or a late afternoon event
- Easily customized to your specific event
  – An "invitation only" gathering of client families, prospective high-net-worth families and their CPA's, estate planning attorneys (no limit to the number of attendees)
  – An intimate talk for an entire family in the privacy of their home
  – A briefing for your most important CPA or attorney firm on the topic of *Family Dynamics & Wealth Transfer*
  – Conference call presentations also available

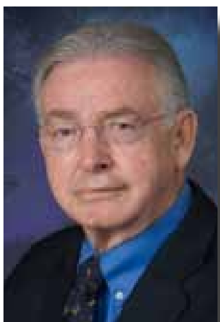
HOW TO REQUEST A SPEAKER FOR YOUR EVENT

To invite Vic or Roy to speak, inquire about speaking fees or learn how to customize the presentation for your next client event, email Carol Sherman, Institute for Preparing Heirs, at csherman@preparingheirs.com or call Carol at 626.389.8664.

INSTITUTE FOR PREPARING HEIRS | 301 North Lake Avenue, Suite 810 | Pasadena, California 91101 | 626.389.8664
www.preparingheirs.com | contact@preparingheirs.com |

Featured Speakers

For decades, Vic Preisser and Roy Williams have been at the forefront of coaching affluent families through the often tumultuous process of transferring wealth to the next generation. They've co-written multiple books and articles on the subject. The foundation for Institute for Preparing Heirs is based on their vast wealth of knowledge, 40 years of field research and first hand experience working with families.



ABOUT VIC PREISSER

Founding Director,
Institute for Preparing Heirs
Managing Director, The Williams Group

Vic Preisser is a much sought-after speaker on the challenges and opportunities facing affluent families and their professional advisors when transferring wealth to heirs. He has extensive experience in coaching and mentoring heirs on career choices, and assisting heirs as they adjust to those choices. He also trains institutions to work with their high-net-worth clients on wealth transfer issues. With the Fortune 500 companies where he served as a senior executive, two state level cabinet appointments, and three businesses within his own family, Vic brings practical experience that has proven essential to family coaching. Vic served as the Director of the Institute for Family Business and Resident Professor of Management at the University of the Pacific. As a frequent lecturer to graduate schools of major educational institutions, he has authored numerous case studies on strategic and organizational issues.

Vic also holds BS (summa cum laude) and MBA degrees, both from Stanford University.

ABOUT ROY WILLIAMS

Founding Director,
Institute for Preparing Heirs
Founder, The Williams Group

Roy Williams is the acknowledged dean of post-transition research and planning. In 1994, he was awarded a doctorate (honoris causae) by the California School of Professional Psychology, the largest graduate school of professional psychology in the nation. The honor was given in recognition of Roy's 30 years consulting with families on the crucial role of trust and communication in a successful family business and the transfer of wealth.

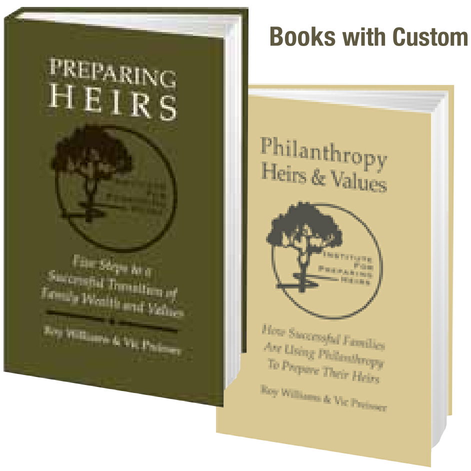
Roy completed the largest research project to date on family wealth transfers, studying several thousand families to determine why only one-third of the families succeeded in retaining their wealth and family harmony into the next generation. In 1995, Roy was privileged to speak before The House of Lords in London, and he has been quoted in *The International Herald Tribune* and *The Financial Times* regarding his work in the wealth-transfer field. He graduated from the University of the Pacific in 1963, and played tackle for the San Francisco 49ers.

"The Institute's holistic approach of family wealth management is crucial to maintaining a long term relationship with families. This allows wealth advisors access to the family, thus giving opportunities to meet with heirs and increase the probability of keeping assets among multiple generations."

– A Wealth Advisor

Creating an Exceptional Client Event

MATERIALS INCLUDED at no additional cost



Books with Custom Labels

30 copies of either *Preparing Heirs* or *Philanthropy Heirs & Values*, with *your* personalized custom label provided at no additional cost. *(Quantity:30 – a $540 value)* Additional books with custom labels available at the discounted price of $18 per book, *excluding shipping.*

Print Ad/Event Poster

Complimentary black and white or color ad to promote your specific event information. We'll customize it with your event information. You simply place the ad with your local newspaper. Also makes a great poster to display at your event. Electronic file supplied for you to take to your personal printer for final production. *(Approximate size: 42.5" x 38.5")*

MATERIALS AVAILABLE FOR PURCHASE

Custom Invitations

High-quality invitations with matching envelopes printed with *your* contact information and the date/time/location of *your* event. All you have to do is add the mailing labels, postage and send them out!

Cost: $275 for 50 invitations, *excluding shipping*

Wealth Transition Checklist

This 10-question Checklist indicates a family's "heir readiness" for transition and promises to start the conversation among family members.

Cost: $100 for 100 checklists, *excluding shipping*

Educational Folder

The Institute's high-quality, content-rich education folder with information on developing a Family Mission Statement, how to measure a family's preparedness for wealth transfer, and more!

Cost: $250 for 50 folders and inserts, *excluding shipping*

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