

UPDATE 2011

Financial Advisors and Planners Professional Practices Review



Agenda

	Introduction by Moderator	Terry Zive
45 mins	The Power of Integrated Financial Planning	Scott Beckett
50 mins	Case Study Introduction Integrated Planning for a High Net-Worth Business Owner Case Study Exercise: Broad Concepts Questioning	
	BREAK	
40 mins	Preserving Wealth within Complex Family Relationships	Christine Van Cauwenberghe
40 mins	Case Study Exercise: Preserving Family Wealth	
	LUNCH	
35 mins	Protecting Family Wealth for Older Clients	Kathryn Bennett
35 mins	Case Study Exercise: Incapacity Planning	
	BREAK	
35 mins	Strategies for Transferring Family Wealth	Kathryn Bennett
35 mins	Case Study Exercise: Transferring Family Wealth	
	BREAK	
40 mins	Corporate-Owned Life Insurance: An update for business Owners	Kevin Wark
35 mins	Case Study Exercise: Preserving Business Interests	
	CLOSE	