



TURNING YOUR LIFE PLAN INTO YOUR LEGACY

Course Description

This presentation has been developed for the direct benefit of families of wealth and the advisors who counsel them. The course offers proven techniques that teach professional advisors how to counsel individuals and family in creating their family legacy plan. This workshop includes participation in exercises that will allow you to experience key components of Legacy Planning from the Heart™, and prepare you to engage in the communication of delicate financial issues in building a positive family legacy.

You will be lead through four successful legacy engagements each with compelling outcomes. The engagement outcome demonstrates the ability to leverage wealth distribution desires through the appropriate use of proven advanced planning techniques.

If you have a desire to learn more about lifetime, values-based legacy planning, you don't want to miss this opportunity to learn from an industry expert.