

UPDATE 2011

Financial Advisors and Planners Professional Practices Review



Agenda

Chapter:	Greater Vancouver	Location:	Eaglequest Coyote Creek Golf Course
Date:	November 17, 2011	Time:	8:30 am – 5:00 pm

9:00 a.m.	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	
15 min	BREAK	
40 mins	Preserving Wealth within Complex Family Relationships	Christine Van Cauwenberghe
40 mins	Case Study Exercise: Preserving Family Wealth	
Noon 55 min	LUNCH	
35 mins	Protecting Family Wealth for Older Clients	Kathryn Bennett
35 mins	Case Study Exercise: Incapacity Planning	
10 min	BREAK	
35 mins	Strategies for Transferring Family Wealth	Kathryn Bennett
	Case Study Exercise: Transferring Family Wealth	
10 min	BREAK	
40 mins	Corporate-Owned Life Insurance: An update for business Owners	Kevin Wark
35 mins	Case Study Exercise: Preserving Business Interests	
5:00 p.m.	CLOSE	