

Family Wealth Management ©

Objective: We are in the midst of a period in which trillions of dollars are being transferred from one generation to the next. Some families will transfer their wealth effectively, while others will not. This course will analyze the techniques frequently used to increase, preserve, and transfer wealth. The instructor will also address the advantages and disadvantages of each technique.

What you will learn:

- The importance of educating all family members and getting them involved
- The non-monetary factors that should be considered
- The key factors to consider in allocating assets among different asset classes
- How to increase a family's wealth
- How to preserve and protect a family's wealth
- Numerous techniques for transferring a family's wealth
- The advantages, and disadvantages, of wealth transfer techniques
- Whether the family business should be transferred or sold
- The estate, gift, income, and generation-skipping tax provisions to consider
- The advantages and disadvantages of using a family office
- Pitfalls to avoid

CPE: 8 hours

Level: Basic to Intermediate

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: FWMA