

Increasing & Preserving Wealth ©

Objective: This intermediate level course drills down into some of the concepts and ideas introduced in our family wealth management course.

Learning objectives:

- Evaluate the ways to increase wealth
- Assess the pros and cons of each option
- Identify the key factors to consider in allocating assets among different asset classes
- Explain numerous ways to preserve and protect wealth
- List the factors to consider before purchasing insurance
- Identify legal issues relevant to asset protection
- Describe the hurdles to overcome in increasing wealth

CPE: 8 hours

Level: Intermediate

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: IAPW