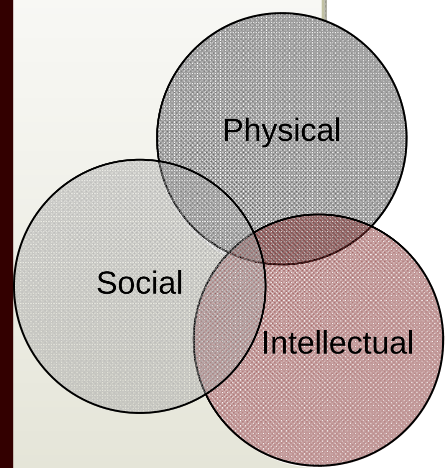
Top Ten P's for a Successful Wealth Transition

Announcing a unique opportunity to not only discover the pitfalls in transferring wealth to your children, but also the steps that are critical to preparing them for the job of managing and preserving that wealth.

From a foundation that clarifies your overreaching PHILOSOPHY and PURPOSE for your wealth, to developing PROCESSES and PLANS for action, you will discover the **top ten things** to address in preparing for a successful transition of that wealth to the next generation.

In Canada, an estimated one trillion dollars will change hands over the next decade. When it comes to transitioning that wealth, an estimated 70% of families will be unsuccessful. Wealth will be lost and families will be feuding. A US study found that the majority of parents failed to instill a sense of PURPOSE for the wealth they bequeathed to their families.



Now YOU can learn how to beat the statistics

You will discover how to prepare for the continuity of the three types of wealth you have amassed over the years:

* the social assets that are the foundation of your family legacy
* the physical wealth that will provide for succeeding generations and the greater community
* the intellectual assets that are required to manage and perpetuate that wealth

You will explore the importance of clarifying your defining principles and the role they play in nurturing appreciation and passion for what you have created.

You will garner a better understanding of the importance of participation and engagement from both generations in the process to transfer wealth.

You will leave with checklists to use in planning for the inevitable transition of your estate and preparing your heirs for their role in managing their inheritance.

Willows Golf & Country Club

October 16, 2012 2:00 pm Presentation

5:00 pm Cocktails

We would be pleased to have you as our guest for this educational afternoon with Grant. Please RSVP by October 10th to info@continuity.ca or 306.668.7575 to reserve your seat.

Continuity

Grant Robinson, FCA, Director of the Successcare Program, will share his proven approach to helping families prepare for the future. An accountant by profession of origin, Grant has spent the last 30 years following his passion for teaching Canadian families to take the lead in preserving their wealth and using it to build a lasting family legacy.