

Educational Events – Sample List

There are two different kinds of educational events you could host:

- Related to their Wealth
- Related to General Life.

Here are several types of educational events related to WEALTH, which lend themselves to having your traditional Strategic Partners participating partially or fully:

- Tax Planning
- Estate Planning
- Risk Management (Family Security or Insurance Solutions)
- Planned Gifting
- Executorship 101
- Business Succession & Other Important Corporate Strategies
- Economic Updates & Market Overview

These events require qualified professionals and reliable, accurate information. They are important, but often this content can and should be communicated one-on-one when you are working with your clients in the comprehensive wealth planning & investment management process. Some clients are drawn to learning more and will enjoy these events, while others will gravitate more to General Life educational events.

Here are several types of educational events related to GENERAL LIFE, which will also require an expert on the topic. The expert may also be part of your personal or professional networks:

- How to Protect Yourself from Identify Theft
- Learn How to Effectively Use Your iPad
- How to Teach Your Kids about Money
- The Psychology of Retirement
- What to Consider When Buying a Recreational Property
- How to Prepare for Downsizing