LEGACY BY DESIGN

PRESENTED BY CONWAY & ASSOCIATES

JOIN US MAY 15-16, 2024

Legacy Coaching For Multi-Generational Families

Join us for two days of training. Learn to implement successful coaching strategies with your clients. Help them think through their legacies in deep and meaningul ways.

Do you have clients who:

- Aren't clear what to do with what they have?
- Aren't sure about what will happen with their estate when they are gone?
- Have an estate plan that doesn't align with their real objectives?
- Would like to learn more about how their wealth transfer plan will impact the next generation - both positively and negatively?
- Haven't had conversations with the next generation about what they will do with what they have?
- Might consider giving to their children during their lives instead of at end-of-life bequest?

These and many other issues will be covered in our Legacy Coaching Training

CLARITY | ALIGNMENT | COMMUNICATION

WHAT YOU WILL LEARN

- The skills needed to become a Multi-generational Legacy Coach
- The 3 Stages of Legacy Coaching
- How to conduct a Family Legacy Review - a deep dive into the 5 areas of Legacy: Personal, Family, Financial, Business, and Charitable
- Tackling Tough Questions - What to leave to children, and how to leave it? How much to leave to charity? Who to choose as executors and trustees?
- How to engage the next generation at a deeper level
- How to relate to high net worth families
- How to conduct family meetings
- How to help families develop vision, mission, and value statements
- How to create a Zero Estate Tax Plan

MAY 15-16, 2024

Training At: Reformed Theological Seminary,
1580 Terrell Mill Rd SE, Marietta, GA

Start: Wednesday, 5/15/24 @ 1:00pm
End: Thursday, 5/16/24 @ 3:00pm

11+ hours of personal and practical Legacy Coach training for $3,500 with follow-up training available

Registration:

Online:	www.LegacyByDesign.co/events
Email:	sheldon@conwayassoc.com
	tom@conwayassoc.com
Phone:	402.360.4050 (Sheldon)
	404.295.1142 (Tom)

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