

#1 Canada's leading  
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in Open Enrolment Programs  
THE FINANCIAL TIMES 2017

The effective management of wealth is a critical skill for ensuring the long-term financial success of wealthy families. This program provides the practical insights and knowledge that families need to oversee the management of their wealth and help each family member to be an excellent leader of or contributor to the wealth management process. Participants will learn the key building blocks and frameworks for successful wealth management, how to create an integrated wealth management strategy that considers the family's complete financial picture and how to avoid common catastrophic mistakes.

The program is designed for family members who would like to learn more about the wealth management process and about how to successfully preserve, grow and transition family wealth.

**Location:**

Rotman School of Management,  
Toronto, Ontario, Canada

**Program Fee:**

\$6,500 CAD + HST

Fee includes tuition, all program  
materials and meals.

**Impact**

This program will help participants develop the frameworks, tools and skills to better understand and participate in the family wealth management process.

**Topic Areas**

- Investment planning
- Portfolio management
- Security selection
- Types of family capital
- Tax and estate planning
- Insurance, wills and trusts
- Integrated financial management
- Family governance
- Risk management
- Selection of investment firms and advisors
- Strategies for preserving wealth

**Key Takeaways**

- Develop a comprehensive wealth management strategy that considers family goals, values and personal circumstances
- Identify the pitfalls and common mistakes to avoid
- Select an investment strategy that is realistic, prudent, tax-efficient and actionable given the time and resources you have to commit
- Learn how to integrate the family business or concentrated family asset into a wealth management strategy
- Identify the key roles, responsibilities and opportunities for family members in understanding, supervising and managing the family assets
- Better understand how to effectively manage the personal and social benefits and risks of family wealth

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## Learning Methodology

This distinctive Rotman experience will be led by world-class faculty and experts in the area of wealth management. Sessions will be delivered through a thoughtful pedagogical architecture using adult learning strategies, including class lectures, interactive case work and large- and small-group discussions.

Some of the most valuable learning in the course takes place through sharing experiences with classmates and peers. We create a confidential and solicitation-free environment.

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## Key Faculty and Wealth Management Leaders

**Eric Kirzner** holds the John H. Watson Chair in Value Investing and teaches investment finance at the Rotman School of Management. He is a director and Audit Committee chair of Equitable Trust, a director of the Canada Council for the Arts Investment Committee and Healthcare of Ontario Pension Plan's lead external advisor. Eric designed the Easy Chair Portfolio and co-designed the FPX Indexes. Author or co-author of 13 books on investment finance and over 1,000 articles on security analysis and portfolio management, Eric has written for *The Globe and Mail*, *The Financial Post*, *Maclean's*, *Investor's Digest*, *The Canadian Investment Review*, *Benefits Canada* and *The Toronto Star*.

**Tom McCullough** is an adjunct professor of finance in the MBA program at the Rotman School of Management and the Chair and CEO of Northwood Family Office, a leading Canadian multifamily office providing customized, integrated financial advice and counsel to families of significant net worth. He has spent over 30 years in the wealth management and family office field in leadership and board positions. Tom is a member of the editorial board of the *Journal of Wealth Management* and is the co-author of the new book *Family Wealth Management: 7 Imperatives for Successful Investing in the New World Order*.

**Michael Lagopoulos** is the retired Deputy Chairman of Royal Bank of Canada Wealth Management. A chartered accountant by profession, he has spent 36 years in the wealth management industry. During his 18 years as CEO of RBC International Wealth Management and Deputy Chairman of RBC Wealth Management, he worked with and serviced many of the wealthiest families in Canada and around the world. He is the recipient of two Lifetime Achievement Awards from *Private Wealth Management* and *Family Office Review*, two important journals that cover the wealth management industry. Michael provides private client consulting services to wealthy families and is also a director on a number of corporate boards.

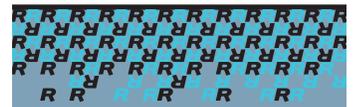
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## Why Rotman?

The University of Toronto's Rotman School of Management is located in downtown Toronto, home to the largest financial district in Canada and the third largest in North America. Situated in the heart of Canada's business capital, Rotman Executive Programs has unique access and insight into the best thinkers and practitioners in business today.

As part of the University of Toronto, one of the world's top 20 research universities, the Rotman School fosters a new way to think that enables our graduates to tackle today's global business challenges. Home to some of the most innovative research institutes in the world, Rotman boasts an impressive network of global partnerships in a variety of academic disciplines and with the corporate sector.

Executive Programs at the Rotman School of Management is committed to delivering programs for individuals and custom programs for organizations that influence organizational leaders worldwide. Rotman Executive Programs inspires and empowers leaders to develop the capacity to transform themselves, their organizations and their communities.



### Who Should Attend?

This program is intended for families, with a net worth of at least \$10 million who have built wealth in this generation, have inherited family wealth or are contemplating or have recently experienced a liquidity event.

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### Find Out More:

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