Family Wealth Management

Rotman

#1 in Canada for Open Enrolment
THE *FINANCIAL TIMES* 2020

Learn the key frameworks for successful wealth management.

Why Rotman?

As part of the University of Toronto, the Rotman School of Management is Canada's leading business school and has Canada's largest group of management faculty. It is home to some of the most innovative research institutes in the world and boasts an impressive network of global partnerships in a variety of academic, corporate and community sectors.

At Rotman Executive Programs, Canada's leading executive education provider for open-enrolment programs, we enable leaders to develop the capacity to transform themselves, their organizations and their communities by offering specialized business education programs for individual and organizations which address today's business challenges and opportunities.

Develop a framework for success.

The effective management of family wealth is a critical skill set in ensuring the long-term financial success of wealthy families.

This program will provide 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 and/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.

Key Benefits

During the program participants will have the opportunity to

» Develop a comprehensive wealth management strategy that considers family goals, objectives, values and family 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

We're here to help.

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 lectures, interactive case work and large and small group discussions.

A 3 and a 1/2 day program

Location:

Rotman School of Management, Toronto, Ontario

Address:

Executive Programs
Rotman School of Management
149 College Street
Toronto, Ontario M5T 1P5

Program Fee:

$6,500 CAD + HST

The program fee includes tuition, all program materials, and class-day meals.

The fee does not include travel or accommodation.

Questions?

Contact Sharon Doopan at 416.946.0726 or sharon.doopan@rotman.utoronto.ca.

Family Wealth Management

Rotman

#1 in Canada for Open Enrolment

THE *FINANCIAL TIMES* 2020

Learn the key frameworks for successful wealth management.

	Day 1	Day 2	Day 3	Day 4
Morning		» Goals and Risks » Goals-based Wealth Management » Goals-based Wealth Case	» Tax and Estate Planning	» Family Dynamics, Communication, Succession » Pulling It All Together: The Wealth Management Plan
Afternoon	» Family Wealth Management Learning Goals » Introduction to Family Wealth Management » Family Capital and Governance » Cocktail Reception	» Asset Classes and Allocation » Case Study	» Investment Approaches and the Investment Policy Statement » Selecting Investment Managers » Case Study » Group Dinner	» Case Study » Closing Lunch

Subject to change.

Who Should Attend?

This course is for wealth owners only. Family office executives may attend with principal family members but no other financial services professionals may attend. The course is ideal for those:

- striving to maintain prosperity and a flourishing family through retirement and, for many, across generations.
- contemplating - or recently experiencing - a significant liquidity event, whether through the sale of a company, inheritance, or other major wealth transition.
- committed to engaging their families in more productive dialogue about the challenges and opportunities of wealth.
- seeking added confidence to evaluate and select financial advisors and/or to set strategic direction for a family office.

We have found that multiple members of the same family derive considerable benefit from taking the course together. The program gives them a foundation for continued productive dialogue well into the future.

Featured Faculty

Tom McCullough is an adjunct professor of finance in the MBA program at the Rotman School of Management and the Chairman 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/ family office field in leadership and board positions.