Wealth Planning Essentials – Live-Online

WEEK 1

All times are Central Time

Full Program Experience:
Includes all sessions plus three small discussion groups

Condensed Program Experience:
Includes all sessions

Time	Monday, June 14	Wednesday, June 16	Friday, June 18
8:30-9:00 a.m.		**Coffee Chat**	**Office Hours with Stuart Lucas**
9:00-10:15 a.m.	Session 1 **Strategic Wealth Management Framework** Stuart Lucas	Session 3 **Investment Strategy 1** Stuart Lucas	Session 5 **Investment Strategy 2** Stuart Lucas
10:15-10:30 a.m.	Break	Break	Break
10:30-11:30 a.m.	Session 2 **Defining Your Financial Objectives** Stuart Lucas	Session 4 **Managing a Taxable Investor's Balance Sheet** Stuart Lucas	Session 6 **Measuring and Managing Financial Tradeoffs: Eat well or sleep well?** Stuart Lucas
11:30 a.m.-12:00 p.m.	**Participant Introductions**		

12:30-1:30 p.m.
Small Discussion Group 1 Facilitated by Stuart Lucas **Evaluating Alternative Investments as a Taxable Investor**

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WEEK 2

All times are Central Time

Time	Monday, June 21	Wednesday, June 23	Friday, June 25
8:30-9:00 a.m.	**Office Hours with Stuart Lucas**	**Coffee Chat**	**Office Hours with Stuart Lucas**
9:00-10:15 a.m.	Session 7 **Risk Management Case Studies** Stuart Lucas	Session 9 **Fire Drill: Preparing for Sudden Departure** Sara Hamilton	Session 11 **Rethinking Your Financial Advisor's Value Proposition** Stuart Lucas
10:15-10:30 a.m.	Break	Break	Break
10:30-11:30 a.m.	Session 8 **Building a Vision for Your Wealth and Family** Stuart Lucas	Session 10 **Strategic Philanthropy** Caren Croland Yanis	Session 12 **Wrap Up: Setting Yourself Up to Win** Stuart Lucas
11:30 a.m.-12:00 p.m.	**Social Time**		**Complete Program Feedback Form**

Monday, June 21	Friday, June 25
12:30-1:30 p.m.	12:30-1:30 p.m.
Small Discussion Group 2 Facilitated by Stuart Lucas **Growing a Family Business into a Family Enterprise: The Evolution of Governance**	Small Discussion Group 3 Facilitated by Stuart Lucas **Hiring, Managing and Evaluating Your Financial Advisor for Improved Outcomes**