# Wealth Planning Essentials – Live-Online

## WEEK 1
All times are Central Time

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday, October 12</th>
<th>Wednesday, October 14</th>
<th>Friday, October 16</th>
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</thead>
<tbody>
<tr>
<td>9:00-10:15 a.m.</td>
<td>Session 1: Strategic Wealth Management Framework</td>
<td>Session 3: Managing a Taxable Investor’s Balance Sheet</td>
<td>Session 5: Measuring the Tradeoffs: eat well or sleep well?</td>
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<td></td>
<td>Stuart Lucas</td>
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<tr>
<td>10:15-10:30 a.m.</td>
<td>Break</td>
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<tr>
<td>10:30-11:30 a.m.</td>
<td>Session 2: Picking Your Financial Objectives</td>
<td>Session 4: Investment Strategy 1</td>
<td>Session 6: Investment Strategy 2</td>
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<td>Stuart Lucas</td>
<td>Stuart Lucas</td>
<td>Stuart Lucas</td>
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<tr>
<td>12:30-1:30 p.m.</td>
<td>Small Discussion Group 1 Facilitated by Stuart Lucas</td>
<td>Small Discussion Group 2 Facilitated by Stuart Lucas</td>
<td>Small Discussion Group 3 Facilitated by Stuart Lucas</td>
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<td></td>
<td>Intergenerational conversations about wealth. The role of myth in shaping family culture. What do you ask? What do you say?</td>
<td>Strategic Considerations for a Family Office</td>
<td>Evaluating Alternative Investments as a Taxable Investor</td>
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**Social Time** (11:30 a.m.-12:00 p.m.)

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**Full Program Experience:** Includes all sessions plus two small discussion groups (six possible topics)

**Condensed Program Experience:** Includes all sessions
## Wealth Planning Essentials – Live-Online

**WEEK 2**

All times are Central Time

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday, October 19</th>
<th>Wednesday, October 21</th>
<th>Friday, October 23</th>
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</table>
| 9:00-10:15 a.m. | **Session 7**
Risk Management Case Studies  
Stuart Lucas             | **Session 9**
Planning the Next Chapter:  
Liquidity Events and Generational Transition  
Stuart Lucas             | **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    
Stuart Lucas             | **Session 12**
Five Lessons from Successful Multigenerational Families  
Stuart Lucas             |
|                 | Please note: this session may extend to 12:00 p.m.     |                                                             | Social Time (11:30 a.m.-12:00 p.m.) |
| 12:30-1:30 p.m. | **Small Discussion Group 4**
Facilitated by Stuart Lucas
Growing a Family Business into a Family Enterprise: the evolution of governance | **Small Discussion Group 5**
Facilitated by Stuart Lucas
Applying Entrepreneurial Stewardship to Your Own Circumstances | **Small Discussion Group 6**
Facilitated by Stuart Lucas
Hiring, Managing and Evaluating Your Financial Advisor for Improved Outcomes |