

Save the Date:

2012 Family Wealth Advisor Training: “Working with Family Dynamics”

Sponsored by Northwood University

Dennis Jaffe, Jim Grubman, and Northwood University are pleased to announce the 2012 schedule for the ongoing training program **Working with Family Dynamics: Becoming an Effective Ultra-High-Net-Worth Advisor**.

Following the success of the inaugural multi-day workshop in November, 2011, we are planning our next programs for **May 14 - 15 at the Delamar Greenwich Harbor in Greenwich CT** and **November 5 - 6, in Dallas TX** (pending confirmation of venue). The tuition for each program is **\$2200**, with continuing education credits offered in several disciplines.

At each program we work with small groups of advisors in an intensive case-oriented, experiential program. Targeted specifically to high-end wealth managers and family-office-level advisors, the program is aimed at developing fundamental skills for advising families in areas related to family dynamics, intergenerational decisions about family wealth, governance and succession. Each participant is asked to do some pre-work and self-assessment in order to maximize learning at the on-site workshop. After the workshop, attendees will be invited to join a cohort follow-up and support group.

We plan to offer this foundation program regularly inclusive of a workshop in Europe in early 2013. For advisors who have completed the foundation workshops, we will also offer an advanced program beginning in 2013 combining the fundamental and advanced programs with telephone and on-line supervision to offer a certificate in family wealth advising.



We are extremely gratified by the response to our pilot program last fall in Dallas. We commit to maintaining attendance at each of our workshops to less than 30 participants. In doing so, we fulfill our intention to offer you deep personal learning that makes a difference in your work with UHNW families.

Watch for further information on the web and via email during February. To register your interest or inquire about upcoming programs, please contact **Susan Eckstrom** via susan@wealthadvisortraining.com or by phone at **413-775-0557**.



DELAMAR - GREENWICH HARBOR

GREENWICH, CT

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Based on 85% guestroom pickup for this event, the hotel will provide the following amenities:

- Group room rate one day prior and one day post event date
- One complimentary glass of champagne on arrival
- Complimentary valet parking for overnight guests
- Continental breakfast offered in the lobby each morning
- Complimentary wireless internet access
- Chauffeured car service within 3-mile radius of hotel
- Coffee, cappuccino, and espresso served daily in the library