

## **What will the advisor learn from this presentation?**

In this presentation, the advisor will expand their knowledge as it pertains to banking, intergenerational wealth transfer, retirement, financial and estate planning knowledge.

They will learn why it is so important to keep their relationships intact with the various family dynamics today.

### Presentation Overview

Are you laser-focused on strengthening relationships with your existing households?

An estimated \$1 trillion\* in wealth transfers could take place over the next decade and up to 80%\* of spouses and 87%\* of the children leave the current advisor. Most banks monitor large deposits such as life insurance proceeds and are quick to offer support... and investment options. Don't be scared. Be prepared. \*Source: [advisor.ca/fa-mag.com](http://advisor.ca/fa-mag.com)

Join Manulife Bank in finding opportunities in bridging the family divide – focusing on spouses, women, widows, and children.

### In this session we'll explore:

- How to build relationships with wives, widows, and moms by avoiding numbers and focusing on empathy
- Where are the kids? Online, of course. Discover digital approaches and product solutions for the next generation
- Becoming part of the family. Being their daily financial debt and cash flow counsellor will make you essential and build assets at the same time

What does a bank know about wealth transfers, moms, and children? Well, this Bank is owned by Manulife, one of the world's largest insurance companies that sends millions to beneficiaries every year. We know wealth transfers and our insurance roots helped us build family-centric banking solutions designed to create flexibility and reduce financial stress.

Clients may want RRSPs, TFSA and other investments but they can't live without a bank account. They also need somewhere to live, and a home often means a mortgage. Let's start your conversations with the essentials. Let's gain instead of losing during the \$1 trillion wealth transfer.