

Business Owners and Estate Planning: Is There a Role for Life Insurance-Based Solutions? - Presented by Peter Wouters & Sponsored by Canadian Initiative for Elder Planning Studies (CIEPS).

What will the advisor learn from this presentation?

The advisor will learn that this presentation will enhance their financial, estate and business planning skills that are required to do the best job possible for the client or prospect.

Presentation Overview

Protecting the business as the most important family asset is certainly top of mind. Sustainability is an opportunity to build a business that will stand the test of time. That speaks to business owners in the world around us and to advisors as business people, building their practices and penetrating the business market.

This fast paced, thought-provoking session will explore various scenarios and test whether life insurance-based solutions can play a role in addressing issues and providing alternatives for advisors and their business clients.

Attendees will walk away with hands-on questions to ask to get the conversation going with business owners and their families. They will be exposed to how life insurance-based products may provide benefits when looking at funding shareholder agreements, alternatives to trusts in select situations, customized payments to beneficiaries and estate planning.