

Estate planning today is based on three fundamental assumptions. First, a person's wealth can be summarized on a balance sheet. Second, if transferring some financial wealth is good, then transferring more is better. Third, the first place you should go to do your estate planning is an estate planner. What if all of these fundamental assumptions are actually all fundamentally wrong? The keynote will discuss what is wrong with current estate planning and how it can be fixed. It will discuss the importance of capturing and transferring human capital, how to maximize the benefits of financial wealth transfer, and what can be done with excess financial resources. It will also review the Seven Disciplines that successful families follow to effectively transfer holistic wealth on a multi-generational basis.