

Wealth That Lasts

**Private Wealth Management
Education Designed for Affluent
Individuals and Families**

SPRING 2021 | LIVE ONLINE COURSE

COURSE DATES: Tuesdays, April 6 - May 4
TIME: 6:00-8:30pm | 5 live online meetings
FREE WEBINAR: Wealth That Lasts Information Session
Tuesday, March 23 | 6:00-7:00pm
RSVP at ce.uci.edu/wtl
TUITION: \$995



OVERVIEW

The relationships you build with wealth advisors are among the most important relationships you may ever have. However, without a clear understanding of your strategy and how each member of your advisory team—e.g., financial advisor, estate planning attorney, accountant, etc.—must work in harmony to effectively achieve your specific goals, your wealth may not be reaching its full potential. In this course specifically designed for high net worth individuals and families, you will develop a personal wealth strategy, learn how to communicate this plan effectively to your advisors, identify ways to measure and manage their progress, and more.

Our top-tier instructors bring over 17 years of experience teaching this course in a way that guides students with varying experience— even those with little or no prior knowledge about finance will benefit. You can expect a hands-on, interactive learning experience with thought-provoking discussions that will help you customize a wealth management plan that balances with your goals and personal circumstances.

PROGRAM BENEFITS

- Unbiased information about wealth management from a trusted source in a solicitation-free and confidential environment
- Two optional one-on-one consultations with the instructor upon completion of the course to address any sensitive questions

WHO SHOULD ATTEND

This course is ideal for you if any of the following conditions describe your financial situation:

- You don't feel 100% confident in your current method of investment management
- You have concerns about how your wealth will transition from one generation to the next
- You have experienced a liquidity event such as selling a business or receiving a large cash settlement
- You want to involve your spouse and/or other family members in managing your wealth
- You have achieved financial success and need a comprehensive investment strategy
- You have felt at an informational disadvantage when speaking with professional advisors

COURSE TOPICS

Build a process-driven wealth management strategy that balances your unique goals and values with your personal financial circumstances

- Block out the random, disconnected noise of the investment markets and focus on the things that are truly important
- Define meaningful and measurable values, goals, and objectives
- Implement investment strategies to protect wealth you have spent a lifetime creating
- Determine your level of risk tolerance for investing
- Communicate your wealth management strategies to your family members and your advisors
- Effectively monitor and evaluate performance
- Develop your personal business plan for investing and learn which responsibilities you can delegate and those you must retain

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COURSE SCHEDULE

WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5
<p>Values and Goals</p> <ul style="list-style-type: none"> • Determining Your Values and Goals • Retirement • Assets and Liabilities • Net Worth Statement • Financial Independence <p>Realistic Expectations</p> <ul style="list-style-type: none"> • Common Investing Myths • Capital Markets/ Major Asset Classes <p>Inflation/Taxation</p> <ul style="list-style-type: none"> • Effects of Inflation • Consumer Price Index • Nominal vs. Real Return • Inflation and Taxes 	<p>Risk Tolerance</p> <ul style="list-style-type: none"> • Determining Risk Tolerance • Relationship between Risk and Return • Tolerance for Volatility • Measuring Risk <p>Asset Allocation</p> <ul style="list-style-type: none"> • Modern Portfolio Theory • Diversification • Positive vs. Negative Correlation • Portfolio Efficiency • Building the Optimal Portfolio • Efficient Frontier • Strategic vs. Tactical Asset Allocation • Monte Carlo Simulation 	<p>Investment Choices</p> <ul style="list-style-type: none"> • Cash • Fixed Income Securities • Stocks • Different Methods of Investing <p>Manager Selection</p> <ul style="list-style-type: none"> • Active vs. Passive Management • Market Timing • Alpha and Beta • Sharpe Ratio • Alternative Investment Products (Indexing, Hedge Funds, Funds of Funds, Annuities, Life Insurance) 	<p>Investment Professionals</p> <ul style="list-style-type: none"> • Investment Managers vs. Investment Advisors • Active vs. Passive Management • Manager Evaluation • Investment Selection <p>Implementation</p> <ul style="list-style-type: none"> • Lump-Sum Investing • Dollar Cost Averaging <p>Investment Policy</p> <ul style="list-style-type: none"> • Investment Professionals vs. Money Managers • Achieving Your Goals • Stages of Service • Other Members of Your Team • Assembling Your Management Team <p>Performance Monitoring</p> <ul style="list-style-type: none"> • Investment Policy Statement 	<p>Estate Legacy Planning</p> <ul style="list-style-type: none"> • Federal Estate Taxes • Powers of Attorney • Last Will and Testament <p>Tangible Personal Property</p> <ul style="list-style-type: none"> • Living Trusts • Second Tier Planning • Charitable Planning

INSTRUCTORS



Robert Bancroft, CIMA® , AAMS, CIMC®

Bob is the founder and owner of Global Wealth Management Institute. He is also the author and instructor of the Institute's "Wealth That Lasts" classes, which are offered through UCLA Extension and UCI Division of Continuing Education. Throughout his 27-year career, Bob has been an OTC Stock

Trader, Financial Advisor, Branch Manager, and District Manager. Since 1989, he has focused his career on learning, adapting, and teaching the methods of institutional wealth management for affluent individuals, families, and fiduciaries.



Jason Bleimeyer, CIMA® , CIMC®

Jason has been in the financial services industry for more than twenty years. In his practice, he advises institutions, fiduciaries, and individuals on sector analysis, asset allocation, and security selection. He guides clients on how to structure portfolios with an emphasis on risk management and tax efficiency. Jason

has taught in conjunction with the Wharton School of the University of Pennsylvania and is sponsored by the Investment Management Consultants Association (IMCA). He also holds the designation of Certified Investment Management ConsultantSM sponsored by IMCA.