SSC # 159 – THE INTERGENERATIONAL ADVISOR: HOW TO RETAIN ASSETS, SUPPORT EXECUTORS, AND BECOME THE FAMILY'S MOST TRUSTED PROFESSIONAL

This course is eligible for:

4.0 Life & A&S CE Credits for BC, AB, SK, MB & ON.

4.0 Life ONLY CE Credits for AB.

Target Audience

This course is designed for:

- Financial advisors
- Insurance advisors
- Wealth managers
- Financial planners (CFP®, QAFP®, PI. Fin.)
- Investment advisors (CIRO)
- Estate and trust professionals
- MGA advisors and agency leaders
- Banking and credit union advisors
- Family office professionals

Course Purpose

The purpose of this course is to equip advisors with the knowledge, tools, and frameworks needed to:

- Understand the Great Wealth Transfer
- Navigate family dynamics and conflict
- Support executors through the estate administration process
- Integrate financial, retirement, and insurance planning into governance
- Protect vulnerable clients
- Build defensible, compliant files
- Facilitate structured family meetings
- Deliver multi-generational value

This course elevates the advisor from planner to **governance architect** — the professional families rely on during their most important transitions.

Learning Objectives

By the end of this course, advisors will be able to:

1. Understand the Great Wealth Transfer
2. Navigate Family Dynamics & Governance
3. Understand Estate Law & Probate Across Canada
4. Integrate Financial, Retirement & Insurance Planning
5. Support Executors Through the 18-Month Estate Marathon
6. Prevent Conflict & Facilitate Family Meetings
7. Maintain Compliance & Reduce Advisor Risk
8. Apply Case Studies Across Canada
9. Use Advisor Tools & Templates