Pro-Seminars

SSC # 174 – THE FAMILY OFFICE ADVISOR: BRINGING HNW LEVEL PLANNING TO MASS AFFLUENT CLIENTS

This course is eligible for:

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

2.5 Life ONLY CE Credits for AB.

Target Audience

This CE course is designed for:

- Life-licensed insurance advisors
- Financial advisors serving mass affluent households
- Wealth managers
- Retirement planners
- Estate planners
- Tax-integrated planners
- Advisors transitioning into holistic planning
- Professionals seeking to differentiate their practice with advanced planning

Course Purpose

The purpose of this course is to:

1. **Equip advisors with a simplified family office framework** suitable for mass affluent clients.
2. **Teach advisors how to integrate financial, retirement, estate, and insurance planning** into one cohesive system.
3. **Provide advisors with a repeatable process** that elevates their value proposition.
4. **Help advisors differentiate themselves** from transactional competitors.
5. **Improve client outcomes** through holistic planning.
6. **Increase advisor revenue** through deeper engagement and broader planning.
7. **Provide compliance-friendly documentation** for integrated planning.
8. **Deliver cross-Canada case studies** showing real-world application.

Learning Objectives

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

- Deliver a simplified family office planning model
- Diagnose financial, retirement, estate, and insurance gaps
- Integrate planning across all domains
- Use structured tools and worksheets
- Provide multi-generational guidance
- Deliver tax-aware planning without giving tax advice
- Recommend appropriate insurance solutions
- Document suitability and compliance
- Position themselves as holistic Family Office Advisors
- Create a repeatable, scalable advisory process