



THE LAUREATE IN WEALTH STRATEGIES REGISTRATION



WE ARE PROUD TO OFFER THE LAUREATE PROGRAMS CURRICULUM CENTERED ON FOUR PILLARS:
THE EDGE, THE BUSINESS, THE PROTOCOLS, AND THE SAFE PLACE.

The Laureate in Wealth Strategies 1-Year Certification Program

The Laureate in Wealth Strategies Program meets four times per year (for three days each time), and for eight teleconferences per year, including attendance at the two-day annual summit program called The Gathering.

Participation Fee \$975 per month for one year

A \$500.00 Registration and Application Fee will be needed with your completed registration.

Registration Information

Full Name _____ Badge Name _____
Firm Name _____ Email _____
Address & Suite _____
City _____ State _____ Zip _____
Phone _____ Fax _____

- I have enclosed my \$500.00 check
- I authorize the Southern California Institute to charge my credit card for the initial Registration and Application Fee of \$500.00.

(Includes Continental Breakfast and all Laureate in Wealth Strategies Program materials)

Billing Information

(Please print name and address as it appears on credit card / billing)

Credit Card Number _____ - _____ - _____ - _____
Expiration Date ____ / ____ / ____ 3 or 4 Digit Validation Code ____ - ____ - ____ - ____
Cardholder Name _____
Cardholder Signature _____
Date ____ / ____ / ____

Please sign and fax your completed registration form along with your current Curriculum Vitae to (858) 200-1922 or email them to jrh@scinstitute.org.

For more information about the programs, please go to www.scinstitute.org

or contact: JENNIFER HARTWELL, Programs Director
jrh@scinstitute.org • 858-200-1911

3636 Nobel Drive, Suite 450 • San Diego, CA 92122

THE WORLD OF THE LAUREATE

A UNIQUE COLLABORATION OF LIKE-MINDED PROFESSIONALS

- Develop ***Collaborative Relationships*** with the Finest Wealth Strategies Planners Throughout the Country.
- Learn from and Share with Instructors Who ***Counsel Affluent Clients***.
- ***Gain Greater Professional Expertise*** as You Push the Boundaries of Your Knowledge and Techniques to New Frontiers in Your Professional Development, Technical Proficiencies, Marketing, and Collaborative Experience.
- ***Achieve Greater Success*** Serving Affluent Clients as You Learn How to Meet Their More Sophisticated Planning Needs.
- Enhance Your Service to New and Existing Clients with the ***Most Recent and Relevant Techniques***.
- Ascend as ***One of an Elite Circle of Your Colleagues*** Who Is Truly Qualified to Help Affluent Families Understand and Realize Their Goals.
- ***Increase Your Professional Satisfaction*** With Greater Emotional and Financial Rewards.

THE LAUREATE CURRICULUM IS BASED ON FOUR PILLARS

THE EDGE: Take your skills to the highest level with a solid foundation in advanced financial, legal, business, and tax planning by utilizing cutting edge techniques. Learn exactly where the edge is and why so many jump over it; and understand how to keep both you and your clients protected. Expand your knowledge and expertise in the administration requirements and investment objectives for many of the trusts and other entities that are often used to create complex wealth-strategy plans. Then learn how to analyze, generate, and integrate all of the financial numbers and legal planning into the design and final documentation of a comprehensive, user-friendly, affluent-family plan.

THE BUSINESS: Learn and share tried and true practice management tools for your business, including specific systems and procedures to implement in your office. Learn the techniques for establishing working relationships with Independent Collaborative Advisors, who are willing to work within your protocols. Experience what to present to a client and when and how to create, package, and present fees proportionate to the creativity and the quality of the results achieved. This pillar of the Laureate Program is geared toward helping you apply a strategic business design in your practice to create a fluid process for managing a client experience from beginning to end.

THE PROTOCOLS: Learn the many processes for working as part of an inter-disciplinary team to develop a client's enlightened dreams, to design the plan, to maintain the plan on an intergenerational basis, and to have a fun and profitable experience along the way. Protocols are especially important in order to create a business atmosphere and an environment of efficiency and organization for your clients and your interdisciplinary team. Through education and sharing of experiences, the Laureate Programs are the ideal training ground to develop a quiet confidence in the wealth, business, and estate planning process to serve the affluent.

THE SAFE PLACE: The Safe Place compiles all the tools and techniques learned through the first three pillars and puts those ideas into practice. Great emphasis is placed on the proper selection and integration of planning techniques into a comprehensive and, more importantly, comprehensible case design presentation. The participants work in a hands-on fashion and collaboratively as interdisciplinary teams on actual client files developed in the practices of the Institute's faculty and participants. We all benefit from sharing our successes and failures in an environment free from judgment and by going through the process become better listeners and better planners. The program instructors rely heavily upon the case-study approach, the goal being for each to student feel comfortable putting together and presenting sophisticated and complex wealth-strategy designs for which clients will gladly pay significant compensation in addition to the traditional legal fees, commissions, and management fees.

