

Tax and estate planning in a Covid-19 world



Life (ON, BC, SK) 1.0 | FP Canada (Financial Planning) 1.0 | RIBO (Pending) 1.0 | AAC #58609 (Life) 1.0 | MB #37418 (Life and/or A&S) 1.0 |

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Much has changed over the past year, but your clients' need for estate planning support has not. If anything, the pandemic has heightened the importance of reviewing wills and estate plans. It's no secret that in Canada approximately \$1 trillion¹ in assets will change hands over the next 10 years and many clients need guidance regarding wealth transfer.

Take steps to understand the challenges of wealth transfers, learn how to solidify your existing client relationships, and get tips on how to strengthen business through the transfer.

Learn about the challenges and opportunities, including:

- How to help solidify your existing client relationships
- Accessing strategies to help protect your clients' wealth for generations
- Tools and resources to help you with client conversations

¹ Investor Economics Household Balance Sheet Report—Canada, 2020.