



GLOBAL PACIFIC  
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## Reminder: Update 2022 - Purposeful Planning

Submitted by Rica Zara on May 3, 2022 - 11:44am



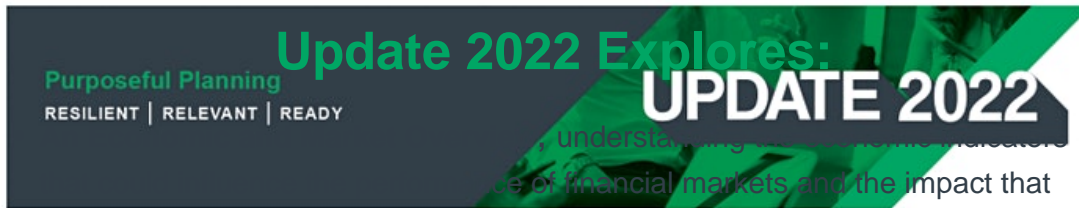
# Planning Opportunities with Business Owners

Thompson Okanagan is pleased to invite peer chapters Vancouver Island, Greater Vancouver and Kootenay as they host *Update 2022 Purposeful Planning - Resilient | Relevant | Ready*. Join us for both half-day sessions on **Wednesday, May 11 from 9:00 A.M. to 12:00 P.M. (PDT)** and **Wednesday, May 18 from 9:00 A.M. to 12:00 P.M. (PDT)**.

Your confident expertise, your support and reassurance, knowing that together you and your clients will find the best way forward for the short term and the long term.

**Register Early:**

No one knows what the future will bring. We know that financial advisors and planners help clients prioritize the future, create a plan of action and guide them forward. **Advocis Update 2022** will help position financial advisors and planners to be resilient, provide timely and relevant advice to their clients and be ready to take



- **Legacy Planning**, considering how clients nearing retirement can balance their legacy planning objectives with immediate family support and their lifetime cash flow needs
- **Building Client Trust and Deepening Relationships through Higher Standards**

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- **Taxation and Succession Planning for Business Owners**