ABFI FAMILY LEADERSHIP SERIES

PROTECTING WEALTH FOR THE NEXT GENERATION

Date: February 22, 2022 **Time:** 11:30AM-1:00PM **Cost:** FREE Online Workshop

FREE REGISTRATION

Based on our experience with business owners and entrepreneurial families, CWB's Robert Bradburn will look at some of the technical aspects of wealth preservation and transfer at a high-level without getting too complex. Areas of conversation might include:

- **The tax burden on investment portfolios held within a company.**
- **The need for buy-sell agreements between family owners.**
- **Estate equalization for children not involved in the business.**
- **Maximizing your estate through the corporation by an Estate bond.**

The goal of the session is to shed some light in areas that are often not priorities, providing insight so families enterprises might have meaningful discussions with their professional advisors.

Presented by:
SFIEHFYR
IRIEP EREI
-RWYERGISPYMSRV
EPL EREIIR

With over 14 years of experience in the financial services industry, Robert specializes in helping business owners and executives manage their wealth by integrating taxation, wealth preservation, philanthropic pursuits, retirement, business succession, and estate planning. As the lead for the Insurance Solutions team for CWB Wealth, he ensures CWB has a consistent approach to advice and strategies for all of our clients. Robert works for his clients and holds the client experience at the heart of his planning engagements and leadership of Insurance Solutions.

Brought to you by Canadian Western Bank

abfi@ualberta.ca

CWB Canadian Western Bank

UNIVERSITY OF ALBERTA