



GLOBAL PACIFIC
FINANCIAL SERVICES LTD.

Update 2022 - Purposeful Planning

Submitted by Rica Zara on April 20, 2022 - 12:00am



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.

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**

Source URL: <https://mail.globalpacific.com/bulletins/advocis/2022-04-20/update-2022-purposeful-planning>

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