



GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## 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)**. [Not Sure Of Your Adv](#)

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.

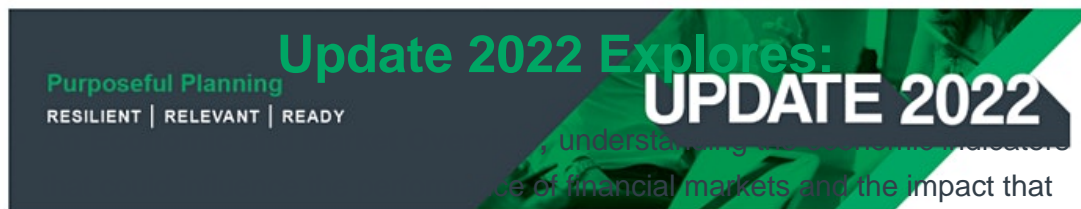
**Register Early:**

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. [Register Now](#) Available spots are limited and will be on a first-come, first-served basis.

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



**Update 2022 Explores:**  
**UPDATE 2022**  
Purposeful Planning  
RESILIENT | RELEVANT | READY

understanding the current state of financial markets and the impact that may have on clients. The Institute for CFP® Credits (includes 1.0 Ethics),

- **Legacy Planning**, considering how clients nearing retirement can balance their discount, **3.0 A&S**, and **1.0 CE**.
- **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**