



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

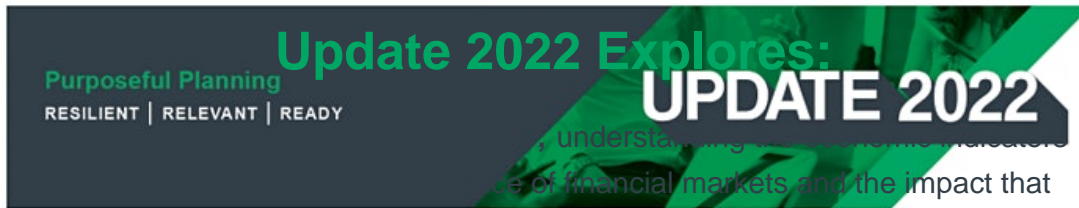
Thompson Okanagan is pleased to invite peer chapters Vancouver Island, Greater Vancouver and Kootenay as they host *Update 2022 Purposeful Planning - Resilient | Relevant | Ready*. Join us for both half-day sessions on **Wednesday, May 11 from 9:00 A.M. to 12:00 P.M. (PDT)** and **Wednesday, May 18 from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

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:

[Register Now](#)

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://www.trustglobalpacific.com/bulletins/advocis/2022-05-03/reminder-update-2022-purposeful-planning>

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