WealthWise™

Understanding wealth,
making the most of your ownership

Programme 2009

key wealth forums

An essential agenda for people with significant money

WealthWise™ is a unique, university-style course specially created for people who already own or expect to come into substantial wealth. Delegates will discover how to get the best out of professional advisors, maximise the benefits of wealth ownership, gain a proper understanding of investments and asset classes, appreciate wealth's potential impact on their lifestyle – both positive and negative – and recognise the value of philanthropy.

The confidence to enjoy your wealth

However you come into wealth, it is essential that the wealth belongs to you rather than you to it. That is why, to enjoy all the opportunities that wealth confers, it's essential to be fully informed. Only in this way will you

- Understand how wealth works in the 21st century and be prepared to manage the risks that can destroy it
- *Be ready to use your freedom and talents to the full, confidently developing your personal lifestyle objectives – and the road to reaching them*
- Appreciate the benefits of owning wealth – and the matching responsibilities, both financial and personal
- *Know what your rights are as beneficiary of a Trust, Foundation or company shareholder.*

The WealthWise™ programme, which takes place over 1½ days, is specifically designed to equip delegates to achieve all this – and more. It will ensure that you do not live in the shadow of wealth, but gain rich insights that will complement your material well-being.

Who should attend

Anyone who already owns or expects to receive significant money will benefit from WealthWise™.

The course as a whole is designed to meet the needs of

- Wealth owners who have built a successful business
- *Those in mid-life who receive the proceeds of an inheritance or sale of a business*
- Younger members (typically aged from 20 years upwards) of wealthy families
- *Successful executives ready to invest the proceeds of a large bonus*
- People who want to protect the value of a divorce settlement.

At the same time we recognise the advantages of dividing the programme into break-out sessions to match delegates' age, experience and particular needs. So when you first register we will ask you to specify your priorities. We will discuss this with you when you arrive and make all necessary arrangements for you to benefit from a one-to-one with appropriate Course tutors.

How you will benefit

By the end of the WealthWise™ programme you will be able to

- Understand the sources, uses (and potential abuses) of wealth
- *Cut through the jargon used by many financial advisors and institutions, and so recognise what it really means*
- Clarify your investment objectives and the relationship between risk and reward
- *Recognise the reasons for considering different types of assets – both financial and non-financial, from property to art*
- Comprehend a Financial Statement, and its implications for you
- *Understand your rights as a wealth owner – and how to maximise the benefits of tax planning*
- Appreciate the value of philanthropy
- *See the advantages of forming your personal lifestyle objectives – and the action plan that will help you achieve them.*

A Self-Evaluation Questionnaire and Appraisal Tools will be provided during the course to enable delegates to explore their personal areas of concern and other issues. Their purpose is to help you re-examine or develop your personal objectives and so create the action plan with which to build your self-esteem, win the respect of others and enjoy a happy and successful life. A Life Coach is part of the tutor team and will be available for private one-to-one consultations.

2009 Programme outline

WealthWise™ is held in the private rooms of a luxury London hotel. Check in during the late afternoon on Thursday 2nd April. Receive the delegate's Welcome and Programme pack. Discuss any personal objectives and requirements that you have with our Course Administrator. The programme's professional tutors and keynote speakers are available during the course so that delegates can benefit from one-to-one mentoring, and our Course Administrator will be happy to set up meetings.

The first night features a reception at 19.00 followed by a private dinner at 19.45, during which there will be a short introductory talk about the Forum and introductions of the tutorial team. An after-dinner Guest Key Note Speaker will talk from personal experience about the impact of wealth on families, their organisation and lifestyle.

See the back page of this brochure for full details of the Programme.

Register your interest today

WealthWise™ is a very popular programme, and we keep the number of participants low to maximise the benefits of networking with a peer group who share similar interests and concerns to yours. Early registration of your interest is recommended to ensure that you reserve your place. Please contact Brian Clarke at Key Wealth Forums: brian.clarke@key-trust.com

Friday 3rd April

9.15 **The Economic Environment and Cutting through the Jargon**
What is going on in the world and what does it mean? How the City works. Understanding how to maximise the usefulness of Professionals and their respective roles.

10.15 Coffee Break

10.45 **Fundamentals of an Investment Strategy**
From the basic building blocks of different investment types, to the balance of risk and return and how to match objectives with an investment strategy.

12.00 Break
(with opportunity for one-to-one meetings)

13.00 Lunch

14.00 **Making a profit with Property Ownership**
1. Personal occupation
2. Investment property
3. Development projects

15.00 Tea Break

15.30 **Understanding Accounts**
Everything you need to know in 75 minutes!

16.45 Finish of day one Tutorials (followed by one-to-one meetings if requested)

19.30 Dinner with Keynote guest speaker – **Owning Collectables for pleasure and profit**
Different types, where to buy, how to buy, insurance.

Saturday 4th April

9.15 **Understanding Structures**
What they are, how they work, when to use Trusts / Companies / Foundations / Partnerships

10.15 Coffee Break

10.45 **Understanding your Rights**
1. As a shareholder of a Company
2. As a beneficiary of a Trust
3. As a member of a Partnership

12.00 **The benefits of Tax Planning**
1. Smart planning using structures
2. When to borrow and when to spend
3. How to organise ownership and benefits

13.15 Finish

Key Wealth Care

Key Wealth Forums is the innovative training and conference division of Key Wealth Care, the Wealth management group specialising in private client and family office services.

Other group companies include the award-winning, independent Key Trust Company and Key Financial Reporting, our dedicated bookkeeping and accounts administration arm.

Key Wealth Forums
PO Box 116 Hilgrove House 10 Hilgrove Street
St. Helier Jersey Channel Islands JE4 8SU
Telephone: +44 (0) 1534 630500
Facsimile: +44 (0) 1534 639669 E-mail: brian.clarke@key-trust.com

A member of KS International

key wealth forums

Registration Form

Name:. . . . .

Address: . . . .

. . . .

. . . .

. . . .

. . . .

Tel: . . . .

Fax: . . . .

Email: . . . .

What is the key issue that you would like us to cover:

. . . .

. . . .

. . . .

. . . .

. . . .

. . . .

. . . .

. . . .

☐ I enclose my cheque in the sum of £1,499
plus 15.0% VAT, total £1,723.85 incl VAT.

Payable to Key Wealth Forums

Key Wealth Forums
PO Box 116 Hilgrove House
10 Hilgrove Street St. Helier
Jersey Channel Islands JE4 8SU

key wealth forums

Key Wealth Forums
PO Box 116 Hilgrove House
10 Hilgrove Street St. Helier
Jersey Channel Islands JE4 8SU