



Baby Boomers, Millennials and Wealth Transfer: What You Need to Know



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A Moody's Analytics Company

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Meet The Presenters



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What should Canadians know about intergenerational wealth transfer and why is it important?



What are some common themes or challenges that you've noted among your clients with regards to wealth transfer?



How can Canadians best prepare and what steps are required for an intergenerational wealth transfer?

Communication



Everyone's Unique



Get Professional
Advice & Stay
Flexible





What should clients ask of their financial advisors to help achieve and execute a smooth transition plan?

Why should you seek advice from a qualified professional?



Q & A

To learn more about designations, visit csi.ca
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Thank you

