

Financial Seminar Event

Generational Wealth:

Avoiding the 3 Reasons Families Fail to Transfer Generational Wealth

In 1776, Scottish economist and philosopher Adam Smith penned one of the most influential books on economics and wealth, The Wealth of Nations. In his magnum opus, Adam Smith found it necessary to lament on the failure of families to successfully preserve generational wealth . . . “Riches in spite of the most violent regulations to prevent their dissipation, very seldom remain long in the same family.”

Michael Miller from Capital Planning, will explore some of the root causes for the systemic failure that threatens generational wealth and what separates successful families from those that fail to preserve their family wealth.

You will be provided with an elegant framework that can be adopted and customized for your own family as well as valuable tips on how to apply some of the secrets to generational wealth preservation.

Capital Planning, LLC is an SEC registered investment advisor. The content of our seminars is not sponsored or endorsed by The Boeing Company and is intended for educational purposes.

Date: Wednesday, May 15, 2019

Time: 11:30 am to 1:30 pm (a wonderful plated lunch will be provided)

Cost: \$ 5.00 per person

Location: El Gaucho Restaurant, 450 108th Ave NE, Bellevue, WA 98004

Event Coordinator: William P (Pete) Bailey; peterb00001@onebox.com 206-232-9451; 4708 E Mercer Way, Mercer Island, WA 98040

Instructions: Mail completed coupon (printable copy on next page) indicating seminar date and mail check payable to BLN to the event coordinator. For directions call Capital Planning call Kira Hackett - 425-643-1800, Capital Planning, LLC.

El Gaucho offers garage parking and will be validated for the event, please bring your ticket

BLN Retirees Event Coupon

Print, fill out, and mail this completed coupon with self-addressed stamped envelope, and check payable to BLN to the event coordinator.

Member Name: _____

Guest Name(s): _____

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Event Name: _____

Event Date: _____