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FINANCIAL SERVICES LTD.

JOIN US! Advocis Presents ?Coffee Talks?

Submitted by Rica Zara on June 30, 2022 - 4:57pm



Advocis Presents:

2022 Series - Episode seven: Life Insurance and the Wealthy

A Coffee Talk Webinar

Many wealthy clients don't realize that they can benefit from life insurance.

Wealthy individuals aren't looking to solve their needs? Their needs are often already met by their large pool of assets. They now have a large estate. As in, they want to reduce tax impacts and ensure a large net estate value when they die.

This episode of Coffee Talks has been approved by The Institute for **0.5 CE credit**. Join us on **July 7th at 11:00 am EDT** for a Coffee Talk as Advocis welcomes

Mark Davis, MFin, CFA, Director of Professional Insights at Sun Life as he

discusses how to help show wealthy clients how they can meet their needs.

Please note: Once registered you will receive a confirmation with webinar

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