



# 2019 PROGRAM GUIDE

*Connect. Learn. Grow. Do.*

## **Alternative Investing Strategies – April 16, 2019**

Join Brennan McCarthy, CFP® as he unpacks the techniques needed to build wealth through real estate investing. Key topics include: finding deals, analyzing deals, getting financing, adding value, managing critical relationships, and capturing financial benefits. Light Dinner and Door Prizes Included. Seating is limited to 25 guests. RSVP to (877) 664-2583 or [janessa@blvdwealth.com](mailto:janessa@blvdwealth.com). Located inside the Learning Center at Fare Hypnosis: 8353 Crystal View Road #201, Eden Prairie, MN.

## **Leveraging Business Assets – May 9, 2019**

Troy Noor, CFP®, CFA can teach you how to find and use your business value inside your overall financial plan. For most families that own a business, the value is substantial, but unknown. Key topics include: business valuation, business planning concerns, family dynamics, and business succession. RSVP to (877) 664-2583 or [janessa@blvdwealth.com](mailto:janessa@blvdwealth.com). Located inside the Learning Center at Fare Hypnosis: 8353 Crystal View Road #201, Eden Prairie, MN.

## **Equipping The Next Generation – August 1, 2019\***

Gain a multi-generational planning perspective, as Aaron Kolkman, MSF, CFP® unpacks major risks in transferring family wealth and values. Key content includes: 1) addressing technical and non-technical risks, 2) drafting a legacy letter, and 3) stewardship principles. This unique offering is for families both exploring and refining their estate planning priorities. Outside advisors are welcome. BOOK SIGNING TO FOLLOW. The first 5 RSVP's will receive a hardcover copy of The Life Cycle of Wealth™ (Expanded Edition). Light dinner and refreshments served! Seating is limited. RSVP [janessa@blvdwealth.com](mailto:janessa@blvdwealth.com) or (877) 664-2583. Location TBA.

## **Family Fall Harvest – September 21, 2019\***

The first ever social event for BOULEVARD families! Let BOULEVARD treat your entire family to an afternoon of relaxation, as you Enjoy Minnesota's colorful outdoors, pick apples, ride a horse, enjoy a barbeque, and sit by the fire. Invite other families! RSVP to [janessa@blvdwealth.com](mailto:janessa@blvdwealth.com) OR (877) 664-2583. Located at the Noor Family Farm: 10224 Babcock Ave, Plato, MN.

## **Memory Care and Money – November 12, 2019\***

Derek Villars, CLU®, CASL®, ChFC® hosts this engaging dialogue about extended long-term care for families with memory care concerns. Mr. Villars offers trustees and family members options for self-insuring and insuring risk with commercial carriers. For families currently experiencing memory care issues, this program equips families to better manage their relationships in the middle of stress and changing circumstances. RSVP to (877) 664-2583 or [janessa@blvdwealth.com](mailto:janessa@blvdwealth.com). Location TBA.

*\*Tentative date*