nuveen
A TIAA Company

This program supports:

Client acquisition	Financial planning	Investor content

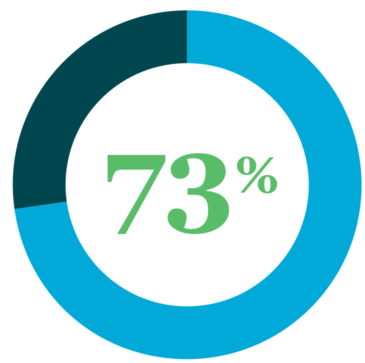
CE APPROVED
1 hour CFP, IWI and CPE for CPAs

The next generation of wealth transfer

An action plan for passing on what matters most

Why participate in this program?

- Most of your high-net-worth clients are likely planning to transfer wealth — and not just their financial assets
- All clients can benefit from a clear action plan for passing on what matters most
- Nuveen's five-star framework for wealth transfer enables you to offer highly personalized guidance at a scale that's manageable for you and for clients



of affluent investors expect to pass a large portion of their wealth to heirs[1]

LEARNING OUTCOMES	QUESTIONS ADDRESSED	FORMAT
Articulate the value of wealth transfer planning	How do I start the wealth transfer planning conversation with clients?	50-minute presentation, available live and on demand
Accompany each client on a personalized planning journey	How can I efficiently scale wealth transfer planning across my practice?	Financial professional and investor versions available
Offer tips, insight and guidance to help clients take action and avoid mistakes	How can I add value throughout the wealth transfer planning process?	One hour available CE credit for CFP and IWI, CPE credit for CPAs

These conversations help me initiate relationships with future wealth inheritors

My clients – and their kids – really need this information

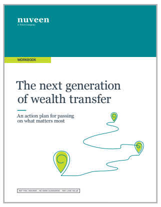
The workbook is a road map for getting wealth transfer planning done

Summary

A family's wealth includes – but is not limited to – their financial assets. This program is designed to help advisors implement a strategic framework for engaging clients in simple but comprehensive wealth transfer planning, including critical family communication and education.

Additional resources

Appropriate for use with clients, these materials can support your wealth transfer planning conversations.



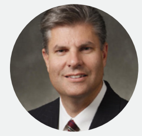
INVESTOR WORKBOOK guides clients on a personalized planning journey and includes a quick-start assessment

INVESTOR PRESENTATION on how families can work with their financial professionals to create a sound wealth transfer plan

DONOR-ADVISED FUNDS PRIMER helps clients leverage a powerful tool for family communication and wealth education

ACTIONABLE ARTICLES focused on a range of wealth transfer topics, such as tax considerations and special family situations

ADVISOR EDUCATION SPECIALISTS



James Bergeron, J.D.

Molly Huck, CIMA®

Robert Kron, CFP®

Christine Stokes

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

About Nuveen Advisor Education

Nuveen brings our financial professional partners – and their valued clients – an award-winning group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

We look forward to partnering with you.

1 Source: Cerulli, 2023.

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