Advising Families, Family Businesses and Family Office – The Advisor of the Future

Associate Professor Chris Graves and Adjunct Professor Adam Steen of The University of Adelaide Business School in association with Family Business Australia would like to invite you to *The Advisor of the Future* a three-city Masterclass series for family advisors. The masterclass is aimed at existing or prospective advisors in family business or family wealth management.

About the Presenter

Cindy Radu LL.B, LL.M. TEP, ICD.D draws on over 30 years of legal, fiduciary, trust and governance experience in professional services firms, financial institutions and family offices. She uses her skills to provide an objective perspective and facilitate understanding of how complex family, business and ownership structures can impact family dynamics and family wealth continuity.

Throughout her career, Cindy has been a speaker, author, and committee and/or board member for a variety of North American and International professional organizations, including The Executive Committee Ltd Canada (TEC), the Society of Trust and Estate Practitioners (STEP), the Chartered Professional Accountants of Alberta and the Canadian Tax Foundation. Cindy is past Chair of the STEP Worldwide Business Families Global Steering Committee. Read more about Cindy at https://cindyradu.com/

Cities, Dates and Bookings

Adelaide - Tuesday February 25th University of Adelaide Business School 10 Pulteney St, Adelaide

Book at: https://familybusinessassociation.org/event/wealth-advisor-masterclass-adelaide-feb-2025

Melbourne - Friday, February 28th Deakin University Tower 2 level 12/727 Collins St, Melbourne

Book at: https://familybusinessassociation.org/event/wealth-advisor-masterclass-melbourne-feb-2025

Sydney - Wednesday March 6th Bentleys Accountants 14/60 Margaret St, Sydney NSW 2000

Book at: https://familybusinessassociation.org/event/wealth-advisor-masterclass-sydney-mar-2025

Price

$300 incl. GST for general admission and $250 incl. GST for event sponsors.

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Wealth 3.0 Masterclass Program Outline – Meet the Flintstones!

Facilitator: Cindy Radu, LL.B., LL.M., TEP, ICD.D
With over 30 years of experience across law, accounting, trust, and governance, Cindy supports exceptional families with amplifying their wealth potential across generations. Her collaborative approach connects deep technical knowledge with a compassionate focus on family dynamics, fostering open communication and informed decision-making.

Who Should Attend? Advisors, regardless of industry, who

- o work with exceptional families
- o keep on top of best practices
- o are keen to deepen client relationships and get 'better' outcomes

Overview This interactive session - based on the Flintstones family - illustrates the impact traditional advisor approaches can have on

- o advisor – client dynamics
- o achieving optimal outcomes for multi-generational family wealth transitions

Session Goals

- o Introduce participants to "Wealth 3.0" concepts
- o Case based discussion on
    - Common approaches to working with families
    - The client experience
    - Advisor and family impacts
- o Collaborative approaches : Better outcomes

Discussion Topics and Activities

- o What do families of wealth want?
- o Wealth 1.0 to Wealth 3.0
- o Flintstones Case Study
- o What is "Wealth"? The 10 Domains of Wealth
- o Collaboration Rocks!
- o Key takeaways