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NOVEMBER 10-13,  
2019

# 2019 Distinguished Advisor Conference

LEARN MORE ABOUT "FINANCIAL CAPACITY: WORKING WITH CLIENTS WHO MAY NOT HAVE IT"  
WITH SPECIAL GUEST KEYNOTE SPEAKER TERRI WILLIAMS.  
REGISTER BY SEPTEMBER 15



**TERRI WILLIAMS, CFP**  
SPEAKER ON DAC DAY 3

JOIN TERRI WILLIAMS AT DAC 2019  
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## FINANCIAL CAPACITY: Working with Clients Who May Not Have It

It is an increasingly common and challenging scenario: in an aging demographic you find that one of your very best clients is starting to lose financial decision-making capacity. You want to do the right thing for your client, but don't have all the tools you need to transition to this next life stage. With the right preparatory work, you can protect many of these clients from their own bad decision-making and exploitation by others. Without it, you risk not only your client's financial well being but also your own professional reputation.

Advisors and clients who do not take the right steps soon enough, find themselves at a crossroads without a clear path forward. This session will identify the proactive steps you can take to give your clients confidence that there is a plan in place for their long-term financial well-being.

Hear from 19 outstanding thought  
leaders, and network with hundreds  
of leading advisors, only at DAC.

Agenda

Register