

WEALTH PRESERVATION STRATEGIES™

ADVANCED FINANCIAL STRATEGIES FOR AFFLUENT FAMILIES

WHAT?

Classroom Instruction on
Expert Wealth Preservation
& Growth Strategies

WHERE?

DFW-Area: UT Arlington,
TCC Northeast, TCC Northwest,
and Tarleton State Ft. Worth

WHEN?

Multiple Dates Offered
in the Spring and Fall
Semesters: Details Inside

REGISTER TO LEARN:

- Multi-Generational Wealth Strategies & Legacy Architecture
- Business Continuity & Succession Design
- Advanced Entity Structuring For High-Level Asset Protection
- Alternative Investment Management (Art, Autos, Collectibles, etc.)
- Philanthropy, Social Impact & Values-Based Charitable Giving
- Strategies to Shield Your Assets from Unnecessary Risk, Loss, & Erosion

"We knew how to grow wealth, but not how to protect it. The strategies we learned were eye-opening and immediately applicable. We now feel far more confident about the next 20 to 30 years."

MICHAEL D., SOUTHLAKE

TUITION: \$69 PER PERSON, TEXTBOOKS INCLUDED



Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES

TRUSTED EDUCATION FOR A SECURE FINANCIAL FUTURE

WHY ATTEND THIS CLASS?

Extraordinary wealth requires extraordinary strategy. Affluent families face unique challenges: rising taxes, market volatility, longevity risks, and increasing complexity around passing wealth to the next generation. Without a wealth preservation plan, even substantial estates can diminish faster than expected. Discover time-tested wealth preservation strategies and tools used by financial experts to prevent avoidable financial loss. Maintain control, protect your lifestyle, and confidently secure your family's legacy.

WHO SHOULD ATTEND?

This education experience is designed for those seeking to protect, scale, and strategically steward significant wealth across decades and multiple generations. Learn to navigate advanced tax structures, protect luxury and alternative assets, optimize business wealth, and create enduring generational continuity.

You will gain a refined understanding of strategies typically reserved for family offices, institutional investors, and multi-generational private wealth families. If your assets, influence, or financial decisions carry significant scale, this class will provide the insight you need to make sharper, more strategic moves.



THIS COURSE INCLUDES ACCESS TO THE FOLLOWING INTERACTIVE RESOURCES:

- Family Wealth Architecture Blueprint™
- Generational Wealth Stewardship Guide
- High-Income Tax Optimization Playbook
- Comprehensive Risk Exposure Audit
- Cybersecurity & Privacy Protection Toolkit
- Luxury Asset Valuation Workbook
- Real Estate Portfolio Evaluation Dashboard
- High-Value Real Estate Protection Toolkit
- Succession & Business Continuity Checklist
- Philanthropic Mission & Identity Builder™
- Charitable Trust Strategy Worksheet
- Your Wealth Preservation Roadmap™

LETTER FROM A SATISFIED STUDENT

Dear Josh,

I'm writing to express my gratitude for offering this Wealth Preservation course. My husband and I were truly impressed by your knowledge and the way you made complex topics feel easy to understand. We especially appreciated the section on alternative investments. It opened our eyes to just how much vulnerability we had been overlooking.

A little about us: we're in our 50s, business owners for 20+ years, and now very focused on securing what we've built for future generations. We've always worked hard, but we didn't fully grasp how many ways were available to protect and preserve the everything we've worked so hard for.

For the first time, we feel confident that our wealth can support our lifestyle AND become a lasting legacy for our family. Your worksheets helped us begin conversations

we've avoided for years, and the Family Wealth Architecture Blueprint™ has already become a staple in our family meetings.

The textbook has also been an incredible resource. The charts and case studies brought everything together so clearly. I've filled the margins with so many notes that I may need to request a fresh copy!

But truly, the greatest gift was the opportunity to meet with you privately. Your guidance gave us direction to begin our own plan. For the first time, "wealth preservation" feels less like a vague idea and more like a path we can actually follow.

We are deeply grateful for your expertise encouragement. Thank you for helping our family protect what we've built, and for giving us tools to plan for the future. We look forward to seeing you again soon.

Warm regards,
Charles & Elaine A. from Flower Mound, TX

WHAT STUDENTS ARE SAYING ABOUT THIS COURSE

"This class opened my eyes to how much I was unknowingly putting at risk. I always assumed we were 'fine,' but I realized I was missing key strategies that could protect what I've worked for. I walked away feeling more in control and far more confident about my finances."

CAROLINE S., COLLEYVILLE

"What surprised me was how much we didn't know. Building a sizable portfolio, we started to realize how unprepared we were for the tax implications. This course helped us restructure our assets so we can preserve more of our wealth for ourselves and our children."

ANDREW T., FORT WORTH

WEALTH PRESERVATION STRATEGIES™ COURSE PREVIEW

PRESERVE YOUR WEALTH 101

In wealthy households, decisions often carry significant scale and consequence. This section introduces the core principles behind advanced wealth preservation: aligning financial strategies, growing generational wealth, leaving a legacy, and avoiding the top threats to affluent families.

SOPHISTICATED TAX STRATEGIES

Next, explore the tax structures created to minimize exposure and optimize capital. Discover the tax advantages of the affluent: entity layering, capital gains timing, charitable tax arbitrage, multi-jurisdictional planning, and more.

MANAGING RISK FOR THE RICH

A well-crafted preservation plan addresses the unique risks that wealthy families face: market downturns, health crises, cyber fraud, etc. As your wealth increases, so does the need for elevated risk planning. Identify your liability exposure, create risk buffers, and protect your privacy.

SAFEGUARDING UNIQUE ASSETS

Next, we'll explore the increasingly broad world of alternative investments embraced by the wealthy: art collections, rare automobiles, collectibles, and more. Uncover the tools you need to evaluate these assets and safeguard them through specialized insurance and entity structures.

REAL ESTATE FOR ASSET STABILITY

Real estate remains a cornerstone of complex wealth portfolios. This segment addresses luxury real estate, investment properties, and commercial property. You'll gain insight into multi-market holdings, depreciation, 1031 strategies, and more.

OPTIMIZING YOUR BUSINESS

Entrepreneurs often hold the majority of their wealth within their companies. Here, we examine business valuation and growth tools, exit planning, and succession design. Integrate profits with personal wealth and maintain operational continuity across familial or leadership transitions.

PHILANTHROPY & A PURPOSE

Today's economic elite desire alignment between financial strategies and core values. Here, explore ESG issues, impact investing, and create a family mission that allows your influence to affect positive change. Discover how purpose and profit can coexist within one coherent wealth strategy.

CHARITABLE GIVING STRUCTURES

Next, maximize your philanthropy: learn how to use donor-advised funds, private foundations, charitable trusts, and asset-based gifting to reduce tax burdens and amplify your impact.

LEAVING A LEGACY

Transferring wealth can be difficult and emotional. This section teaches how to prepare heirs for their future roles and avoid the traps that lead to conflict or rapid loss of wealth. Uncover beneficiary optimization and inheritance structures while avoiding common legal ramifications.

YOUR PERSONAL ROADMAP

The section ties it all together, empowering you to create a custom plan for wealth preservation. Learn advanced strategies and coordinate your counsel, accounting, and advisory teams. This will be your master plan to structure, protect, and grow your estate with precision and purpose.

SYLLABUS: OFFICIAL COURSE OUTLINE

I. WEALTH PRESERVATION PRINCIPLES

- Your Wealth Architecture: Aligning Investment, Tax, & Legacy Strategies
- How to Cultivate Generational Wealth
- Family Governance & Long-Term Stewardship
- The Biggest Threats to Wealthy Families

II. TAX STRATEGIES FOR THE WEALTHY

- Entity Layering: LLCs, FLPs, Holding Companies
- Grantor vs. Non-Grantor Trust Structures
- Multi-Jurisdictional Tax Strategy
- Capital Gains, NII, & High-Income Tax Tools
- Charitable Tax Arbitrage to Lower Tax Liability
- Minimize Tax Visibility & Preserve Privacy

III. RISK MANAGEMENT FRAMEWORKS

- Government & Creditor Liability Exposure
- Safeguard Wealth Against Market Volatility
- Healthcare, Long-Term Care, Longevity Planning
- Cybersecurity & Privacy Protection
- Behavioral Risk Management for Your Heirs

IV. ALTERNATIVE INVESTMENTS & LUXURY ASSET MANAGEMENT

- Valuation of Art, Collectibles, Rare Automobiles, & Other Luxury Assets
- Private Equity, Venture Capital, & Hedge Funds
- Commodity-Based Investments & ETFs
- Liquidity & Risk In Non-Traditional Holdings
- Insurance, Appraisal, & Storage Protections

V. REAL ESTATE PRESERVATION

- High-Value Real Estate Preservation Tools
- Portfolio-Level Real Estate Strategies
- Depreciation, Tax Benefits & 1031 Exchanges
- Evaluate Global & Multi-Market Holdings
- Real Estate in Multi-Generational Portfolios

VI. BUSINESS OWNER TECHNIQUES

- Coordinate Business Wealth & Family Wealth
- Growth Strategies & Valuation Protection
- Business Continuity & Leadership Succession
- Exit Planning & Liquidity Event Optimization
- Advanced Buy-Sell Structures

VII. SOCIAL IMPACT & PHILANTHROPY

- Build A Philanthropic Identity with Purpose
- ESG & Impact Investing Philosophies
- Social Capital, Influence, & Future Impact
- Multi-Generation Philanthropic Involvement

VIII. CHARITABLE GIVING STRUCTURES

- Donor-Advised Funds vs. Private Foundations
- Gifting Strategies for Appreciated Assets
- Charitable Remainder & Lead Trusts

IX. LEGACY & ESTATE PLANNING

- Design A Values-Aligned Estate Plan
- Dynasty Trusts & Long-Term Legacy Tools
- Revocable, Irrevocable, & Advanced Trusts
- Beneficiary Designation Optimization
- Avoid Probate Delays And Legal Complexities
- Coordinate Inheritance, Property, Asset, & Business Transfers

X. BUILD YOUR PERSONAL PLAN

- Combine Multiple Advanced Techniques Into One Cohesive Plan
- Avoid Common Legal & Financial Traps
- Planning for Complex Family Structures & Blended Families
- Leverage Software for Portfolio Optimization
- Coordinate Legal, Tax, & Investment Teams

THIS COURSE INCLUDES EVERYTHING YOU NEED TO LEARN

TRUE CLASSROOM EXPERIENCE

Wealth Preservation Strategies™ is designed to be both enjoyable and deeply informative. Led by a CERTIFIED FINANCIAL PLANNER™ and fiduciary expert, the material is filled with practical insights and real case studies. The setting encourages open discussion, allowing you to ask questions and fully engage in the learning experience.

HANDS-ON LEARNING GUIDE

You'll receive a course textbook created by your instructor filled with examples and interactive content to help understand each concept with ease. Written in clear, accessible language, this book is yours to keep and will serve as a reliable home reference long after class is over.

COMPREHENSIVE EDUCATION

Unlike typical financial seminars that only cover one topic, this program helps you understand the "big picture". You'll explore all the elements of wealth preservation and how they work together to protect your lifestyle and your family's legacy. The class is purely educational, and no financial products are discussed, promoted, or sold.

ONE-ON-ONE EXPERT SUPPORT

For personal questions or a deeper look into wealth preservation for your unique situation, you'll have the option to meet one-on-one with your instructor at no additional cost. This private session is offered exclusively to students and is completely optional, but is not required.

MEET YOUR INSTRUCTORS



JOSH W. STRITTMATTER, CFP® CRC®

Josh has been teaching wealth preservation and several other financial subjects at DFW-area colleges and universities since 2010. His passion is education, and he believes knowledge and financial literacy are important for each and every person at all stages of life.



KELLY BUCHFINK, CFP®

Kelly has been in the financial industry since 2001 and enjoys applying her experience and expertise to helping others. She finds teaching extremely rewarding, and hopes that her students gain knowledge and inspiration to help them meet their financial goals.

IN PRAISE OF WEALTH PRESERVATION STRATEGIES™

"This course was a turning point for me. I've spent decades building my wealth, but I never truly understood how to safeguard it for the long term. The class gave me a sense of relief knowing I can now make decisions that protect both my retirement and my family. The strategies we were taught have been eye-opening and immediately useful."

ANNE R., WESTOVER HILLS

"I've taken financial classes before, but none have been as practical or encouraging as this one. The instructor broke down complicated wealth-building and preservation concepts into easy steps I can actually follow. For the first time, I feel like I have a real plan... not guesses, not assumptions, but a strategy that I can actually put into place."

HENRY S., HIGHLAND PARK

"Instead of worrying about losing money to taxes, fees, or poor planning, I now have a roadmap that helps me feel protected. The teacher's guidance was clear, compassionate, and exactly what I needed. This class made me feel genuinely hopeful about my future and generations to come. I left with a stronger sense of security than I've had in years."

MARGARET W., GRAPEVINE

"I thought that managing my wealth was just about investments, but this class showed me it's also about using different techniques to lower my tax burden, reduce my risks, and combine several strategies to create my own unique plan for my wealth. I'm incredibly grateful for the instruction I received. It's already changing how I structure my finances."

WILLIAM R., UNIVERSITY PARK

Click the button below to view available class dates and to begin registration.

CLICK TO REGISTER

Can't access the button above? Visit: financialclass.org/wealth-dates to sign up.



OFFICIAL COURSE CATALOG

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REGISTER TODAY TO LEARN HOW TO:

- Preserve Wealth through Advanced Tax-Efficient Techniques
- Structure Portfolios for Long-Term Stability & Multi-Generational Growth
- Risk Mitigation Strategies For Complex Wealth Ecosystems
- Reduce Exposure to Creditors, Litigation, and Government Claims
- Prevent Healthcare, Longevity, and Long-Term Care Risks

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