



# **Becoming a Wealth Transfer Specialist: A proven holistic model for financial, tax and legal advisors to expand their family business practice**

*Karl R. Bareither*

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## **Becoming a Wealth Transfer Specialist: A proven holistic model for financial, tax and legal advisors to expand their family business practice** Karl R. Bareither

Becoming a Wealth Transfer Specialist offers financial planners an approach to wealth transfer planning that ensures success for their family business clients financial and relational future. Encouraging honest communication among family members in the planning process, the book outlines a concise, step-by-step process for creating a wealth transfer plan and offers valuable insight from Bareithers thirty years working with business-owning families.

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