Growing Through Learning

Northern Trust offers a variety of programs to help you learn, live and grow.

Illustration by Bruno Budrovic/Images.com

Learning is a lifelong pursuit that can be enriching personally, professionally and financially. But sometimes it can be challenging to find the appropriate learning opportunities to meet your specific interests and needs.

At Northern Trust, you can choose from a variety of educational tools designed to provide everything from information about new investment opportunities to valuable research and suggestions about how to grow, preserve and transfer your wealth.

In addition to acquiring financial skills, we understand you also may want to learn more about how to use your affluence thoughtfully, live meaningfully and guide the next generation to do the same. And being able to do so in a comfortable, confidential environment is important as well.

Throughout our 85-office network, Northern Trust professionals are available to meet and discuss the countless issues that are important to you. Additionally, we sponsor several programs — many in intimate settings — that provide in-depth information and promote discussion about the topics that matter most to our clients. Below is an overview of some of the programs we offer.

Markets and Economy

Market Outlook Forums – Our investment professionals and economists provide information on and analysis of the current economic situation and how it affects the markets.

Wealth Management Issues

Financial Forums – Northern Trust experts present relevant investment, financial and tax planning insights on topics ranging from investment strategies to ever-changing tax laws and their effect on your portfolio and estate plan.

Wealth Preservation and Transfer Forums – Deciding how to transfer your wealth can be a difficult decision. These forums will help you determine what you hope to accomplish with your wealth and the values you wish to pass on to future generations — and explore the strategies that will help you meet your goals.

DreamMakers' Forum® – Every two years, successful African-American business owners and professionals share their experiences about family wealth and managing successful businesses. Interactive presentations and inspiring speakers help participants examine issues and opportunities that accompany the creation, preservation and transfer of wealth.

Family Education

Living Well: Your Guide to Lifelong Health and Wealth Planning – This program, created in collaboration with PinnacleCare, a premier health-advocacy firm, provides you with leading-edge perspectives on key trends affecting your health and wealth, as well as effective tactics to develop an integrated plan.

Raising Financially Fit Kids – For children born into affluence to become responsible stewards of the family wealth, they should be prepared for the responsibilities that accompany it. Northern Trust teams with Joline Godfrey, CEO of Independent Means Inc., to present Raising Financially Fit Kids seminars around the country.

Inspiring Human Capital: An Educational Series for Wealth Management Group Family Members – Designed to address the needs of wealth management clients, this educational program focuses on family concerns such as legacy, values, decision making, reputation, relationships, philanthropy, leadership, legal exposure and fiscal savvy.

> Beyond offering personalized, individual advice to our clients, Northern Trust also holds educational forums around the country on a variety of topics.

Wealth Management Group's Family Financial Forum – This annual forum for family members and family office executives addresses issues many affluent families face, such as family office best practices, global market trends, investments, philanthropy, generational wealth transfer, family governance and the role of technology in the family office.

Professional Advisors

Global Wealth Alliance: Networking Group for Family Office CEOs – Established to bring together executives who oversee highly complex family assets and offices, this select group meets to network and exchange information, opinions and experiences with their peers in a confidential environment.

The Northern Experience – Designed especially for professional advisors, this conference provides members of the professional community with access to the information and ideas they need to address the complex financial needs of their affluent clients.

To learn more about these or other Northern Trust forums and seminars, please contact your relationship manager or e-mail wealthmagazine@ntrs.com. ■