

# CHAPMANCRAIG LTD

## – FINANCIAL LITERACY CPD

A longer-term perspective is only one of the major factors of achieving investment returns that match your personal investment objectives. Whether advising a client receiving a significant lump sum payment (inheritance, proceeds from sale of a business or a divorce settlement) or for your own personal financial planning, being literate in financial matters is essential.

The seminar is comprised of two parts:

1. An introduction to the basic principles of investment, an outline of suitable financial firms and their services, roles and function and a guide to proper due diligence when selecting the appropriate financial firm and specific assets, and;
2. A case study— An appropriate process for negotiating a lump sum settlement in divorce proceedings.

The seminar and case study will be conducted through a slide presentation and be interactive so the audience can ask questions directly related to their daily practice.

The objective is to provide lawyers with a basic level of financial literacy to better serve their clients in the following situations:

1. To calculate an appropriate lump-sum amount to meet future income requirements, e.g., the Duxbury calculation;
2. There is an objective to derive diversified income streams from receipt of a significant settlement from, for example, a divorce, the sale of a business, insurance proceeds or an inheritance; and,
3. In situations where assets (financial and non-financial) are being offered as part of a settlement, determining what assets would best serve the client's requirements and objectives.

The seminar will last 60 minutes.

### **Course Information**

**Course Name:** Financial Literacy

**Presenter:** Craig Chapman

**Language:** English

**Number of Law Society CPD**

**Credits:** 1 Credit

**Location:** Law firm's office

### **Course Information & Reservation**

If you would like to learn more about our CPD presentation and upcoming availabilities, please contact Keelan Chapman:

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