

Amy D'Aprix, MSW, PhD, CPCA

Dr. Amy D'Aprix is an internationally renowned expert on lifestyle issues relating to retirement, aging, caregiving, and family dynamics. As BMO Financial Group's Life Transition Expert she helps clients, and their advisors, navigate these matters to help ensure the success of their overall life goals and financial plans.

She has authored the book *From Surviving to Thriving: Transforming Your Caregiving Journey*, and co-recorded a CD with an accompanying workbook: *Building the Bonds of Friendship in Midlife and Beyond*. She is also the creator of the *Life Memories Journal* and *Caring Cards*. Dr. Amy is a frequent guest on radio and TV shows and has written numerous articles for print and online publications.

Dr. Amy is International Vice President on the Board of the International Federation on Ageing. Amy holds an MSW, PhD, and the designation of Certified Professional Consultant on Aging (CPCA). She was recently honored with a professional achievement award from Case Western Reserve University. And in March of 2012 she was recognized as one of Canada's top business women by Women's Post Media.

Her presentations seek to help advisors deepen relationships with clients by given them a better understanding of personal and family issues and how to talk about these issues as they relate back to financial planning. Her presentation style is practical, a "light touch" to heavy topics and provides advisors with knowledge and skills that they can apply immediately to help grow their businesses. The goals of each presentation are client retention, spousal retention in the event of the death of a client, intergenerational wealth transfer, and increased share of wallet.