

Helping Families To Become Competent And Confident Stewards Of Their Wealth



Susan R Schoenfeld
CEO and Founder
Wealth Legacy Advisors LLC



Winner

- **Outstanding Contribution to Wealth Management Thought Leadership (Individual)**

Wealth Legacy Advisors serves as partner to families of wealth through personal attention and human spirit, and provides guidance to families of wealth, family offices and their trusted advisors on the human issues of wealth: governance, legacy, stewardship, next generation and philanthropy. Based in New York City, Susan is a self-described “recovering” attorney and CPA with deep experience as an advisor to UHNW families and family offices. Susan’s passion is helping families of wealth reach their full potential.

Wealth Legacy Advisors is honored that Susan R. Schoenfeld, nationally recognized thought-partner to UHNW families and their trusted advisors, won in the Best ‘Outstanding Contribution to Wealth Management Thought Leadership (Individual)’ category at the Tenth Annual Family Wealth Report Awards 2023 program.

Wealth Legacy Advisors, also celebrating its 10th anniversary this year, has twice before been named as a winner at the *Family Wealth Report Awards*. In 2020, Susan Schoenfeld was awarded the prestigious ‘*Women In Wealth Management*’ Award for being “one of the few women on the national speaking circuit who is guiding financial services firms and their clients to connect with the human side of the client relationship.” In 2018, Susan also won for ‘*Outstanding Thought Leadership*’.

Explain what you had to overcome in getting to this level?

2022 was a particularly challenging year, both globally and personally. Of course the pandemic was a game-changer for all of us. We had to learn to adapt to the new normal, to new ways of gathering, collaborating, and serving clients.

On a personal level, I overcame a potentially devastating sports injury in late 2021 that landed me in a wheelchair, and I spent the better part of 2022 recovering. Nevertheless, I showed up in-person to speak at conferences, spoke at virtual events, wrote more than a dozen articles, and inspired others with my journey from pain to recovery, self-pity to empathy, despair to gratitude.

What do you hope will be the main consequence of achieving this accolade?

Ten years ago I had a big idea – that what keeps families of wealth up at night is not their investments, taxes or estate plans, but rather raising their families in an atmosphere of wealth to become competent and confident stewards of their wealth.

The families who have invited me into their worlds these past 10 years are each fascinatingly unique but, upon reflection, do fall into two distinct patterns: families experiencing some pressing business transaction or transition, and families who want to “get ahead of the curve” by engaging in governance planning to set up the next generation for success and create structures for better communication and decision-making before the inevitable issues arise.

I am passionate about the work that I do with families of wealth. The so-called “soft issues” of wealth are the hardest of all, and I look forward to my next 10 years of guiding families through the land mines ... and having fun while doing so!



**WEALTH
LEGACY
ADVISORS**

Providing objective advice to families of wealth
through personal attention and human spirit.

WEALTH LEGACY ADVISORS CONGRATULATES CEO AND FOUNDER

SUSAN R. SCHOENFELD

OUTSTANDING CONTRIBUTION TO

WEALTH MANAGEMENT THOUGHT LEADERSHIP AWARD (INDIVIDUAL)



Wealth Legacy Advisors is proud to share its 10-year Anniversary with the Family Wealth Report Awards.

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WINNER

*Outstanding Contribution to Wealth
Management Thought Leadership (Individual)*

**Wealth Legacy Advisors LLC
- Susan R Schoenfeld**

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