



NEWS RELEASE

March 8, 2018

**SUSAN R SCHOENFELD, CEO OF WEALTH LEGACY ADVISORS, CROWNED BEST THOUGHT LEADERSHIP – INDIVIDUAL AT THE FAMILY WEALTH REPORT AWARDS 2018**

Susan R Schoenfeld, CEO of Wealth Legacy Advisors LLC, one of North America's foremost thought-partners to families of wealth and their trusted advisors, was last night crowned 'Best Thought Leadership – Individual' at the 5<sup>th</sup> *Family Wealth Report Awards 2018*. The glittering awards dinner was held at the exclusive Mandarin Oriental, New York.

One of 6 firms to be shortlisted in the Thought Leadership – Individual (Other) category, the triumph is yet another milestone in the Company's drive to be recognized as one of the pre-eminent thought partners to families of wealth.

Showcasing 'best of breed' providers in the global private banking, wealth management and trusted advisor communities, the awards were designed to recognise companies, teams and individuals which the prestigious panel of judges deemed to have 'demonstrated innovation and excellence during 2017'.

The judging panel commented on this winning entry, "This individual has set high standards of thought leadership, not only by the calibre of their written material, but also through the standard of events and educational work done for the industry."

**Commenting on the firm's triumph, Susan R Schoenfeld, CEO of Wealth Legacy Advisors LLC said:** "We are delighted to have been voted the winner of this prestigious award by so many of the industry's great and good. It is a great honour to be recognised in these awards, and testament to the hard work that we have put in over the last 12 months to deliver the highest level of service to our clients, and move us that bit closer to our goal of being recognised as a thought-partner to families of wealth and their trusted advisors".

**ClearView Financial Media's CEO, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to all the winners. He said:** "The firms who triumphed in these awards are all worthy winners, and I would like to extend my heartiest congratulations. These awards were judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management.

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**NOTES TO EDITORS**

**1. About Winning Company**

Wealth Legacy Advisors LLC, based in New York City, was founded by CEO Susan R. Schoenfeld in 2013 to provide high-touch objective thought-partnership to families of wealth and their trusted advisors in what some people call the soft issues of wealth, but Wealth Legacy Advisors prefers to call the human issues that keep people up at night: next generation, legacy, governance, leadership succession, philanthropy, coaching, and managing fiduciary risk. [www.WLALLC.com](http://www.WLALLC.com)

**2. About ClearView Financial Media Ltd (“ClearView”)**

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality ‘need to know’ information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in London, Singapore, Switzerland, South Africa and the Philippines, the company is one of the fastest-growing media groups serving the financial services sector.