



26 November 2019

**WEALTH LEGACY ADVISORS
SHORTLISTED FOR THE *FAMILY WEALTH REPORT* AWARDS 2019**

Wealth Legacy Advisors, thought-partner to families of wealth and their trusted advisors, and its CEO **Susan R. Schoenfeld**, have been shortlisted for the *Family Wealth Report Awards 2019*.

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 2018'.

Commenting on the firm's shortlisting for FAMILY WEALTH COUNSELLING, and her own shortlisting for LEADING INDIVIDUAL, and WOMEN IN WEALTH MANAGEMENT, Ms. Schoenfeld, CEO of WEALTH LEGACY ADVISORS LLC said: "We are delighted to have been shortlisted for these prestigious awards. It is a great honor to be recognized on the shortlist and this is testament to our hard work over the last 12 months."

ClearView Financial Media's Chief Executive, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to the shortlisted firms. He said: "The firms who have been shortlisted in these awards are all worthy competitors, and I would like to extend my heartiest congratulations. These awards are 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 will 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. Our aim is to make these annual Awards one of the brightest, and keenly contested highlights in the wealth management calendar."

Winners will be announced at a gala awards dinner which will be held in New York on March 20, 2019 at the Mandarin Oriental.

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For media enquiries, journalists should contact:

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NOTES TO EDITORS

1. About the shortlisted company

Wealth Legacy Advisors LLC, based in New York City, was founded by CEO Susan R. Schoenfeld to provide high-touch 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

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 New York, London, Singapore, Switzerland, South Africa and Malaysia, the company is one of the fastest-growing media groups serving the financial services sector.