



**WEALTH
LEGACY
ADVISORS**

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

WEALTH LEGACY ADVISORS CELEBRATES OUR WIN AT THE FAMILY WEALTH REPORT AWARDS 2024 FOR FAMILY WEALTH COUNSELING!



Wealth Legacy Advisors is proud to share its 11-year Anniversary with the Family Wealth Report Awards.

The judges commented that Wealth Legacy Advisors “offers a range of services to families of significant wealth including advising on raising family members, developing leadership succession plans and legacies of family businesses. Susan R Schoenfeld is a true thought-leader in the UHNW community.”



WINNER
Family Wealth Counselling

Wealth Legacy Advisors LLC

WLALLC.COM

SUSANSCHOENFELD.COM

212-655-9610

Wealth Legacy Advisors Wins For Family Wealth Counseling



Susan Schoenfeld
CEO and Founder
Wealth Legacy Advisors LLC.

Wealth Legacy Advisors serves as thought 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 that keep them up at night: 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 (and their provider organizations) with the tools to take them to their full potential.

Wealth Legacy Advisors, also celebrating its 11th anniversary this year, has 3 times before been named as a winner at the *Family Wealth Report Awards*.

In 2023, Susan R. Schoenfeld, nationally recognized thought-partner to UHNW families and their trusted advisors, won for ‘*Outstanding Thought Leadership*’.

In 2020, Susan 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*’.

What was the winning formula of your firm that explains why you won?

In the judges’ words, Wealth Legacy Advisors “offers a range of services to families of significant wealth including advising on raising family members, developing leadership succession plans and legacies of family businesses. Susan R Schoenfeld is a true thought-leader in the UHNW community.”

As a conflict-free advisor who provides no investment, tax or legal advice and sells no product, I share my insights directly with wealthy families and with financial

services experts. I regularly write thought pieces in the family office space, and am active as a keynote speaker and a leader of break-out sessions and workshops at conferences throughout the US.

How do you hope your firm will benefit from getting this award?

Wealth Legacy Advisors is this year celebrating a milestone – 11 years since it was founded.

11 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 name Wealth Legacy Advisors was chosen carefully to convey that we advise on the legacy of wealth, not the financial or investment management of that wealth. We are thought partners to UHNW families about the human issues of wealth: their legacy, stewardship and governance.

The families who have invited me into their worlds these past 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 11 years of guiding families through the land mines ... and having fun while doing so!”

