

SPEECH INTRODUCTION

SUSAN SCHOENFELD (*pronounced SHONE-feld*) is an Award-Winning Thought Leader to families of wealth, and Public Speaker to the financial services industry who serve them -- or want to! -- on the so-called soft issues or, as she likes to refer to them, the human issues that keep families of wealth up at night.

Susan won the Outstanding Thought Leadership Award at the Family Wealth Report Awards in 2023 and 2018 for “her many pieces of written thought leadership and participation on panel discussions and in interviews,” and was awarded the prestigious Women in Wealth Management Award at the FWR Awards 2020 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.”

A self-described “recovering” Attorney and CPA, she has spoken hundreds of times, written more than a hundred articles, and contributed to 2 books for families of wealth, family offices and the advisors who serve them.

Susan joins us from her home in New York City, but also loves to spend time in her home-away-from-home in the Berkshires (“*BERK-sheers*”) hills of Western Massachusetts.

Ladies and gentlemen ... **SUSAN SCHOENFELD** (*SHONE-feld*).