

Susan R. Schoenfeld

JD · LL.M. (Taxation) · CPA · MBA · CEO, Wealth Legacy Advisors LLC

Family Wealth Keynote Speaker on the Human Side of Wealth

Helping families and their advisors strengthen communication, prepare the next generation, and preserve wealth across generations.



MEET SUSAN

Susan Schoenfeld is an award-winning keynote speaker on family wealth who helps UHNW families and their professional advisors navigate the human side of wealth: family governance, family meetings, and next-generation stewardship. A self-described “recovering” Trusts & Estates attorney and CPA, Susan spent 14+ years as Principal at Bessemer Trust, then as Family Ambassador to a \$600 million single-family office. She combines decades of real-world experience, compelling stories, and practical frameworks that audiences can immediately apply to their own families and clients.

IDEAL AUDIENCES

- ◆ Family Offices and Wealth Management Firms – client events and key employee retreats
- ◆ Family Business and Family Office Conferences
- ◆ Estate Planning Councils
- ◆ Community Foundations

WHY MEETING PLANNERS CHOOSE SUSAN

- ◆ **Deep expertise:** decades advising families of significant wealth and their professional advisors.
- ◆ **Rare perspective:** estate law, trust administration, family office, and human-dynamics experience in a single speaker.
- ◆ **Proven track record:** invited back to Opal Group’s Family Office Forum every year since 2014.
- ◆ **Audience impact:** practical, actionable insights families will use and advisors can implement in client communications the next day.



MOST REQUESTED KEYNOTES

◆ **Family Wealth: A Hard Look at the “Soft” Issues**

The human issues that keep UHNW families up at night: communication, stewardship, and preparing the next generation.

◆ **Family Governance: The Conversations That Matter Most**

Practical strategies for creating productive family meetings, improving communication, and building governance that works across generations.

◆ **Beyond the Succession Plan**

Navigate the emotional side of leadership transition while preserving family relationships, business continuity, and long-term legacy.

- Four-time Family Wealth Report Award Winner
- Former Principal, Bessemer Trust
- 100+ presentations for families and advisors

WHAT PLANNERS & ADVISORS SAY

“Susan nails it every time... our audiences love her insight and actionable takeaways, and our in-house event planners love her flexibility and responsiveness.”

Doug Borths, (former) SVP, Head of Production, Opal Group

“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.”

Family Wealth Report Awards

“Her professionalism, depth of knowledge, and warm presence made her a joy to work with, and her message truly resonated with our audience.”

Michael D. Napier, Managing Partner, HORAN Wealth

Ready to bring an engaging, actionable keynote for your audience?

www.SusanSchoenfeld.com · Schoenfeld@WLALLC.com · 212-655-9610