

SPEECH INTRODUCTION

What if the most important part of a family's wealth legacy could happen long before the estate plan is signed? Before the wealth is transferred. Before the next generation inherits. Before a family is forced to have its hardest conversations under pressure.

How do families prepare rising generations for wealth? Build the trust and communication necessary to make decisions together? Preserve their relationships, values, and purpose across generations?

Our speaker today is an Award-Winning Thought Leader on the human side of family wealth — and a self-described "recovering" Trusts & Estates attorney and CPA.

Susan Schoenfeld (*pronounced SHONE-feld*) spent nearly 15 years serving ultra-high-net-worth families as a Principal at Bessemer Trust, before becoming Family Ambassador to a \$600 million single-family office.

A four-time Family Wealth Report Award winner, Susan has written more than 100 articles, contributed to two books, and spoken over a hundred times to audiences across the country.

Ladies and gentlemen, please join me in welcoming the person who can help us answer these questions: **SUSAN SCHOENFELD** (*SHONE-feld*).