SCHOENFELD BIOGRAPHIES

HIGHLIGHTS

"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 2020

SHORT BIO

Susan R. Schoenfeld, JD, LL.M. (Taxation), CPA, MBA, is CEO and founder of Wealth Legacy Advisors LLC. She 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 human issues that keep families of wealth up at night: Legacy, Next Generation, Stewardship, Governance, Leadership Succession, and Philanthropy. Based in NYC, she is a "recovering" Attorney and CPA, and "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 2020. Susan's passion is helping families (and their provider organizations) with the tools to take them to their full potential. For more, visit SusanSchoenfeld.com and WLALLC.com.

MID-LENGTH BIO

Susan R. Schoenfeld, JD, LL.M. (Taxation), CPA, MBA, is CEO and founder of Wealth Legacy Advisors LLC, which serves as thought partner to families of wealth through personal attention and human spirit. An award-winning Thought Leader and Professional Public Speaker, she provides guidance on Legacy, Next Generation, Stewardship, Governance, Leadership Succession, and Philanthropy. Based in New York City, she is a "recovering" Attorney and CPA with deep experience as an advisor to families and family offices on the human issues of wealth. Susan's passion is helping families (and their provider organizations) with the tools to take them to their full potential.

After practicing law in both Tax, and Trusts & Estates, Susan was Fiduciary Counsel at Bessemer Trust for over 14 years, then served as Family Ambassador for a private single family office, before launching her consulting practice to families of wealth and family offices.

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 Women in Wealth Management Award at the Family Wealth Report 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."*** She regularly writes thought pieces in the family office space, and is on the national speaking circuit on family office and fiduciary matters at conferences across the country from Newport, RI to Napa, CA, Chicago to Washington DC, Las Vegas, and of course her hometown of NYC.
For more information, visit SusanSchoenfeld.com and WLALLC.com.

FULL BIO

Susan R. Schoenfeld, JD, LL.M. (Taxation), CPA, MBA, is CEO and founder of Wealth Legacy Advisors LLC, which she established in 2013 to serve as thought partner to families of wealth through personal attention and human spirit. An award-winning Thought Leader and professional public speaker, she provides guidance on Legacy, Stewardship, Next Generation, Governance, Leadership Succession, and Philanthropy.

Based in New York City, Susan is a self-described “recovering” Attorney and CPA with deep experience as an advisor to families, family-owned businesses and family offices on the human issues of wealth, including generational legacy and wealth transfer. After leaving Trusts & Estates law, she ran the trust administration department for 14 years at a white-shoe ultra-high net worth trust company, and then was Family Ambassador for a $600 million single family office.

Susan’s passion is helping families — and their provider organizations — with the tools to take them to their full potential.

Get to know Susan:

1. **Attorney, CPA, and Financial Services Leader**. After practicing Tax Law and Trusts & Estates Law, Susan was Principal of Bessemer Trust for more than 14 years, where she developed and implemented generational wealth transfer planning strategies for high net worth individuals and families. She also created, developed and facilitated Bessemer’s Women and Wealth Workshops, designed to explore personal aspects of wealth, which in turn inspired a series of Next Generation of Wealth workshops. In addition, she ran Bessemer’s donor advised fund, and also headed Bessemer’s Northeast Region Trust Administration group. After leaving Bessemer, she was Family Ambassador for a $600 million single family office, as liaison between the family office and its multi-national family members, facilitating the family meetings, and engaging and educating the next generation.

2. **Author & Award-Winning Thought Leader**. 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 Family Wealth Report 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.”***

She wrote “*Fiduciary responsibility: the trustee role and its risks*”, a chapter in *Trusts in Prime Jurisdictions, Fifth Edition* published in December 2019 by Globe Law and Business Ltd. and STEP (The Society of Trust and Estate Practitioners).

Recent articles include:

• *How To Retain Clients During Great Wealth Transfer,* Family Wealth Report, May 17, 2023;
• *Embracing Diversity and Inclusion: Acquiring the best talent is good for business,* Trusts & Estates magazine Family Business Report, March 2021;
• *On Wealth – A Hard Look at the ‘Soft’ Issues*, The International Family Offices Journal, June 2020;
• *Tips For Giving While Living*, focusing on philanthropy as you approach retirement, Trusts & Estates online e-newsletter 10/3/2017;
• *Succession Planning In and For the Family Office*, The International Family Offices Journal, March 2017;
• *Family Office Succession Planning: Helping founders who are ready to retire*, Trusts & Estates magazine High-Net-Worth Report 8/2016;

• *Charity Should Begin at Home: Help clients develop a satisfying approach to philanthropy*, Trusts & Estates magazine charitable giving issue 10/2015;
• *Should You Be Trusted? What to consider before taking on the trustee role*, Trusts & Estates magazine 6/2015;
• *Defining Your Family Legacy*, Family Office Review 2/2014;
• Susan was also featured in the February 2013 issue of Family Office Review.

3. **Contributor to her Profession**. Susan chairs the FFI/New York Family Business Study Group, is a member of AFHE (Attorneys for Family-Held Enterprises), Family Firm Institute (FFI), American Bar Association, New York State Bar Association, and is a former Professional Advisory Board member of NYC Family Enterprise Center and former Board Member of the New York Philanthropic Advisors Network (NYPAN). She is Past Chair of the Family Office Committee, the Estate Planning Committee and the Tax Division Oversight Committee of the NYS Society of CPAs, and previously served as the Society's Vice-President and on its Strategic Planning Task Force, Industry Division Oversight Committee, and Committee on Committee Operations. Susan chaired the Estate Planning Committee of the Society's Westchester Chapter, served as Officer and Executive Board member, and is past-President of that Chapter. She was honored with the Chapter President's Award, and has four times received the Chapter Appreciation Award.

4. **Professional Public Speaker**. Susan is on the national speaking circuit at conferences across the country from Newport, RI to Napa, CA, Chicago to Washington DC, Las Vegas, and of course her home town of NYC. Opal Family Office Forum has invited her back to speak at their annual flagship conference every year since 2014, as well as their smaller regional events. In addition to Opal, other recent presentations include: AFHE (Attorneys for Family-Held Enterprises), Institute for Private Investors (IPI), Marcus Evans Private Wealth Management Summit, and numerous private banks, RIA's, estate planning councils and community foundations. She has chaired the Foundation for Accounting Education's Family Office Conference, Estate Planning Conference, and Annual Tax Conference numerous times.

5. **Academic Over-Achiever and Serial Volunteer**. In addition to her CPA, Susan was awarded an LL.M. (in Taxation) from NYU School of Law, a J.D. from Pace University School of Law, and BBA (summa cum laude) and MBA (with distinction) degrees in Accounting from Pace University. With 4 academic degrees and 2 professional licenses, she brings a rare ability to translate complex concepts into easy-to-digest actionable takeaways.

Susan is volunteer Treasurer for both the Broadway Training Center of Westchester, a not-for-profit performing arts school located in Hastings-on-Hudson, NY, and the Sutton Place Synagogue Women's League in NYC.

To keep life in balance, she loves to spend time in the Berkshires of Western Massachusetts.

Bottom line: Susan Schoenfeld brings a unique combination of financial services, family office, estate planning law and entrepreneurship experiences to any project, and helps ultra-high net worth families, family offices, and their provider organizations create a family-centered culture around the human issues of wealth to boost morale, new business and the bottom line.

For more information, please visit SusanSchoenfeld.com and WLALLC.com