THE LEGACY PLAN:
ADDING INTERGENERATIONAL PLANNING INTO YOUR PROCESS

**PARETO SPEAKER:
DR. KAREN WEISGERBER**

Address the incredible opportunity the current intergenerational wealth transfer offers by focusing on family, legacy, and the critical link you provide for a successful wealth transfer. This framework becomes the central differentiator for you as a legacy planner, integrating multigenerational engagements in your practice. In serving and retaining clients through wealth transfers, it solidifies your role as a trusted advisor for the entire family.

Key Takeaways:

- **Differentiate your practice as a Legacy Practice**
- **Embed intergenerational planning into your process**
- **Strengthen client relationships and connectivity**
- **Proactively engage and build rapport with the Next Generation**

THE MULTI-GENERATIONAL PLAN:
ENGAGING GENERATIONS & FACILITATING FAMILY MEETINGS

**PARETO SPEAKER:
DR. KAREN WEISGERBER**

Ensure you to attend to what clients care most about: their family. With a lens focused on preparing for the intergenerational wealth transfer, it offers a template to directly engage with all generations. Providing family meeting topics, definitions of roles and timelines, you will leave equipped to lead your families on the journey of truly successful wealth transfers.

Key Takeaways:

- **Differentiate your practice as a Multigenerational one**
- **Facilitate meaningful, results-driven family meetings**
- **Build trust by focusing on what the client cares most about: family wellbeing**
- **Develop meaningful connections with the Next Generation**