

OUR ADVISOR SERVICES

ELEVATE YOUR PRACTICE & SERVE FAMILIES FOR GENERATIONS

AT A GLANCE

Continuing Education (CE) courses, engagement tools, off the shelf resources, and coaching to help you differentiate yourself from the competition. Learn to serve, attract, and retain more HNW client-families.

4500+
Advisors Trained

20+
Years Experience

5
CFP® & CPWA® CE Approved Courses

150+
Practical Resources

LEGACY CAPITALS
Trusted by families and their advisors

legacycapitals.com
academy.legacycapitals.com
609-917-0161

WHOLE FAMILY ADVISOR® TRAINING

Acquire the process, tools, and skills needed to better serve your existing family clients and attract new ones. Plus, extend your skills further amongst your team for optimal results.

Our four course training program is expert-led and research-based - designed to give you the skills you need to successfully compete in your marketplace.

Offered in three formats for firms/groups or individuals:
self-paced + virtual | live + virtual | live + onsite

WFAA CERTIFICATION

After completing the four course training program, become a Whole Family Advisor® Associate (WFAA) certified advisor.

MEMBERSHIP

Our membership is designed to help Advisors differentiate themselves in the marketplace and empower them to better serve the multigenerational planning needs of their client-families. Benefits range from educational and client-facing resources to quarterly seminars on relevant industry topics.

ELECTIVE COURSE

Continue your education beyond the core courses and complete our elective course: *Inspiring Females to Financial Confidence*

CLIENT WEBINARS & WORKSHOPS

We can help initiate the legacy conversation with your clients. Offered two ways: Live + Onsite OR Live + Virtual

- Women & Wealth
- The No Numbers Money Talk
- Working With the Ones You Love
- Lessons in Family Philanthropy
- Living Your Legacy
- Are Your Children Ready to Steward Your Legacy?
- Dinner With the Author