WHY
LEGACY CAPITALS?

We have empowered and equipped nearly 1,000 advisors with industry-leading resources, training, and strategic partnerships. Our goal is to enhance advisors' value proposition, enabling them to successfully help families transfer wealth and values across generations.

LEGACY CAPITALS®
Trusted by families and their advisors

IT'S NOT ENOUGH TO KNOW… IT IS TIME TO TAKE ACTION:

THE WHOLE FAMILY ADVISOR®

Trifecta of Events: The Perfect Storm

$105+ Trillion

Transferred **to NextGen**

by 2048

Shirtsleeves to Shirtsleeves in 3 generations

70+%

Heirs *reject* parents' advisors

MULTIGENERATIONAL PLANNING

UNKNOWN NEED

Most planning focuses on **Preparing the Assets** for a family.

Little planning focuses on **Preparing the Family** for the assets.

WHAT IS THE ADVANTAGE?

- **Differentiate** yourself in the marketplace.
- **Acquire** and **retain** clients across generations.
- Feel empowered to serve the **multigenerational planning needs** of your client families.
- Stay at the **leading edge** of the HNW/UHNW industry.

Now you understand the **WHY**, so let's talk about the **HOW**.

LEGACY CAPITALS
SERVICES FOR ADVISORS

AN OVERVIEW

LEGACY CAPITALS' SERVICES & PROGRAMS FOR ADVISORS

Whole Family Advisor® Training

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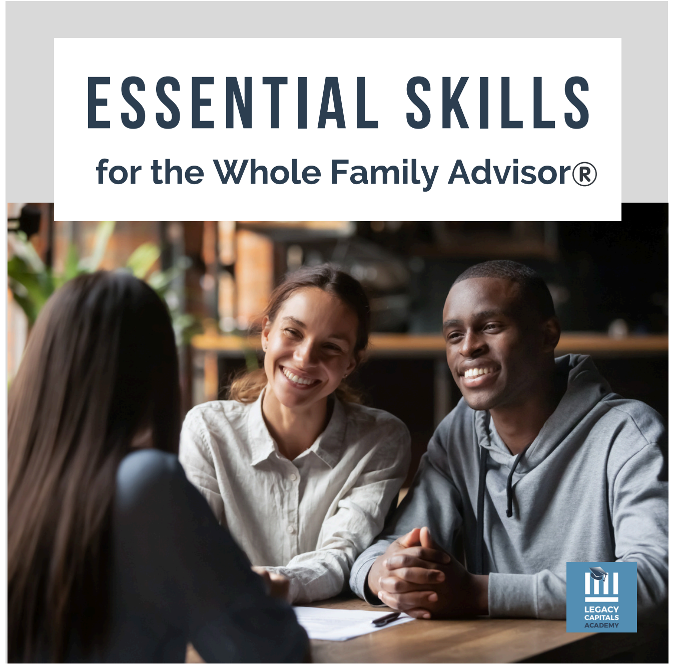
WFA Certification & Ongoing Membership Benefits

WHOLE FAMILY ADVISOR® PROGRAM OVERVIEW



PROGRAM STRUCTURE

4 course program offered in multiple formats:
self paced & virtual, live & virtual, or live & in-person

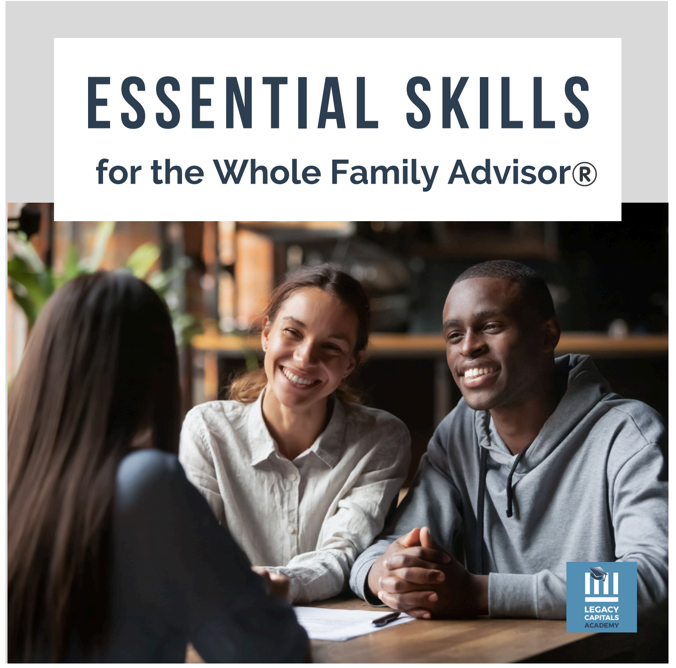
COURSE ELEMENTS

- Workbook
- Pre-Work Assignments
- Lectures
- Engagement Tools
- Quiz

APPROVED FOR CE CREDITS

In total, the four courses are approved for:
8 CIMA®, CPWA®, CIMC®, RMA℠
& 10 CFP® CE Credits

WHOLE FAMILY ADVISOR® PROGRAM RESULTS



ADVISORS WALK AWAY WITH...

- A deeper understanding of their client base to better serve, retain, and acquire clients.
- Ten dynamic tools to engage their client-families on qualitative wealth and legacy topics.
- Enhanced emotional intelligence skills so they can more effectively serve the whole family and navigate tricky family dynamics that arise.
- Our proven 10-step roadmap to successfully design and facilitate multigenerational family meetings.

WFA CERTIFICATION & ADVISOR MEMBERSHIP

LEVEL UP YOUR MULTIGENERATIONAL PLANNING SERVICES

A Certified WFA is someone who...

- Acquires & retains client-families across generations
- Differentiates themselves in the marketplace
- Commits to serving the qualitative multigenerational needs of their client-families
- Engages in ongoing learning

WFA CERTIFICATION & ADVISOR MEMBERSHIP

Your certification and membership benefits include:

- Access to the Resource Hub
- Monthly Best Practices via email
- Exclusive invite to virtual Quarterly Advisor Seminars
- Use of the WFA designation on website and social media platforms
- Add your logo to white-labeled versions of resources and the PDF Family Engagement Tools
- Access to our team of coaches to discuss course content and how to apply it to client scenarios

EXAMPLES OF ARTICLES FROM THE RESOURCE HUB

RESOURCE FOR YOUR OWN LEARNING

READ

Building Connection with the RisingGen: An Advisor Guide

This advisor guide can help get you started in developing relationships with your RisingGen clients. It's not always easy to know how to connect. Gain some insight into what is on their minds, specific ways to connect as well as questions and prompts to help keep the momentum with an authentic relationship.

READ

Shareable

Engaging the RisingGen in Financial Education

This article discusses the importance of educating your children about money and indicates key opportunities found in day-to-day life for engaging the Rising Generation in financial education

RESOURCE TO SHARE WITH YOUR CLIENTS

LEGACY CAPITALS ACADEMY

RESOURCE FOR YOUR OWN LEARNING

READ

[Building Relationships with the RisingGen Through Life Transitions]

This article discusses different ways advisors can connect with RisingGen family members during pivotal moments in their lives such as graduation, marriage, birth of a child or a new job. Connections during these times can solidify an advisor's position as their trusted advisor.

READ

Shareable

[What Does "Prepared" Mean to Your Family?]

This article invites families to consider what being "prepared" truly means for their RisingGen. It offers a thoughtful framework for aligning values, goals, and capabilities to help the RisingGen grow with confidence and purpose.

RESOURCE TO SHARE WITH YOUR CLIENTS

LEGACY CAPITALS ACADEMY

EXAMPLES OF ARTICLES FROM THE RESOURCE HUB

TAKE THE NEXT STEP

VISIT OUR WEBSITE & CONTACT OUR TEAM

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Thank You!