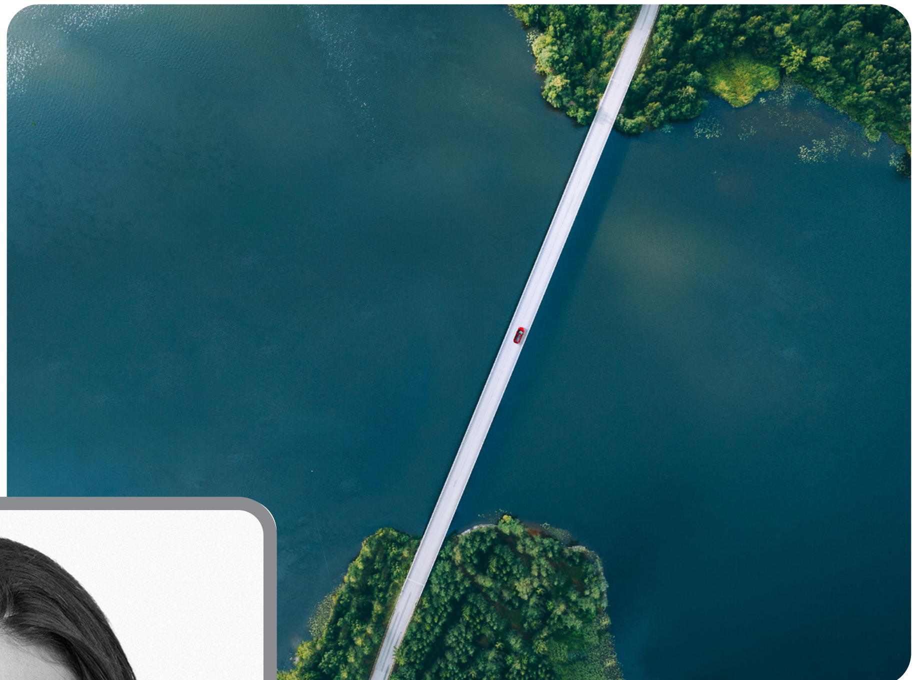
The Legacy Plan:

INTERGENERATIONAL PLANNING & FAMILY MEETINGS



**PARETO SPEAKER:
NATASHA KENNEDY**

The Legacy Plan addresses the immense opportunity of intergenerational wealth transfer by focusing on trust, family, and legacy—going beyond financial performance. It provides a framework for helping families navigate both the emotional and practical aspects of passing wealth to future generations, ensuring your role as a trusted advisor.

Key Takeaways:

- **Embed intergenerational planning into your process**
- **Facilitate meaningful, results-driven family meetings**
- **Proactively engage and build rapport with the next generation**
- **Differentiate your practice through trust and continuity**

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