



# Speaker Introduction:

## Natasha Kennedy

Our next session:

### ***The Legacy Plan – Building Wealth that Lasts***

Focuses on the immense opportunity of the intergenerational wealth transfer — exploring both the emotional and practical aspects of:

How you can prepare? How your clients can prepare? and how their children can prepare to carry that legacy forward?

Our speaker is **Natasha Kennedy**, who brings more than a decade of financial services experience, beginning her career on Wall Street and then working with First Trust Advisors, and now focused on psychology and counselling.

Today, Natasha is a consultant with Pareto Systems helping advisors to strengthen client relationships, and build purposeful businesses. With her background in both finance and psychology, Natasha is the ideal person to guide us through the human side of this great wealth transfer, specifically on adding Intergenerational Planning & Family Meetings into your process.

Natasha...



**paretosystems**  
Consistent. Results.