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Legacy Academy Series

Why and How to Start a Legacy Giving Conversation

This session will discuss how you can be the vital seed planters, by introducing the topic and how you can work with other experts to realise philanthropic aspirations of wealth holders.

Key Facts:

- Legacy is often overlooked – Advisers wait for clients to raise it, missing relationship opportunities.
- Be a "seed planter" – Introduce the topic and collaborate with specialists to help clients.
- Collaborate across disciplines – Tax, legal, and wealth advisers should work together on legacy planning.
- Proactive advisers gain an edge – Early legacy conversations strengthen client engagement and differentiation.
- Use practical tools – Tailored questions and examples make raising legacy topics easier.

Sianne Haldane
Founder, Boon Impact
Sianne is an independent impact and philanthropy consultant, she helps to bring philanthropic vision into reality.

Lizzy Steinhart
Philanthropy Advisor, LCM Family Ltd
Lizzy works in a multi-family office offering strategic advice on how best to maximise the value and outputs of charitable giving and social investments

George King
Senior Wealth Manager, Maseco
A senior wealth manager at MASECO with more than 30 years of experience in financial markets, George King advises HNW families on their cross-border financial needs

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