GREATER NEW JERSEY
ESTATE PLANNING COUNCIL, INC.

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Legace Planning is Different Than Traditional Estate Planning… The People and the Human Side of Estate Planning

Date: Wednesday, March 20, 2024
Time: 9:00 am – 10:30 am
Location: Zoom Webinar only
Speaker: Tom Rogerson, Founder, CEO/President, of GenLeg Co.

Since this is an online event only, please complete **TWO** registrations (Eventbrite and Zoom; see below).

Before there were estate and gift taxes, before there were any taxes, there was estate planning – but it was about the people, places, things, process, and possessions! It was about family! While today's estate planning is in part about asset and wealth shifting and transfer, and taxes are a driving factor, after all is said, done, and documented – there are still people in, around, behind, and part of the plan. Those people are our loved ones, our family. Many estate planning strategies can actually make family governance, dynamics, and harmony more difficult. Can planning help a family go from unhealthy independence to healthy interdependence, and then can planning endow the process? See how a different, very powerful family and legacy planning process can become a critical part of your practice and your client's success.

The Greater New Jersey Estate Planning Council is very excited, and very honored, to have none other than **Tom Rogerson, founder, CEO/President, of GenLeg Co., Inc.**, as our featured speaker. Many of you know Tom, from his national reputation and stature in our industry, from his numerous national speaking engagements, or perhaps from his thought-provoking presentations at Heckerling. Tom is a pioneer, and the country's premier, leading expert in the area of family and legacy planning. Tom is the expert on the people, the human, and the family side of legacy and family planning, family governance, and intra-generational family dynamics! Tom has worked with over hundreds of families around the world, facilitating family meetings, creating a legacy culture, on not just planning, but on collaboration, transparent communication, entrepreneurial mindset and motivation, philanthropic vision, legacy planning, succession development and then endowing the process for the future – all of this and more – to create a cohesive, unified, generational family.

Tom has transformed estate and legacy planning from "Preparing the Money for the Family" to an empowering and amazing "Preparing the Family for the Money" dynamic! In 2017 Tom teamed up with his wife Cathy, a certified relationship coach, and started GenLeg Co., Inc. Together they provide guidance, education, and planning to families and their advisors, helping them transition significant capital, both financial (tangible) and human (intangible), from one generation to the next.

THIS IS GOING TO BE A DON'T MISS EVENT!

Prior to starting a private family legacy consulting practice, Tom was with Wilmington Trust, bringing his family governance and legacy planning expertise, as both a speaker and motivator to families, and to Wilmington's client facing teams to help them integrate family governance and legacy planning into the fabric of the client/family relationships, and the kind of planning that their clients do. Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor's degree in Economics from Ithaca College.

Tom has spoken for The World Presidents Organization (now YPO Gold), Harvard University Business School, TIGER21, The Lincoln Center, Yale University, Dallas Theological Seminary, Vistage, Museum of Modern Art, The Nature Conservancy, New York Botanical Garden, The Dallas Foundation, The New York Community Trust, The Boston Foundation, Heckerling Institute on Estate Planning, The Catholic Foundation, and numerous estate planning councils nationwide, as well as many other organizations.

REGISTRATION INSTRUCTIONS:

1. Please register at: https://www.eventbrite.com/e/legacy-planning-is-different-than-traditional-estate-planning-tickets-855515839907 to reserve your ticket and to let us know your CE requirements.

2. Next, please register for the Zoom Webinar at: https://us02web.zoom.us/webinar/register/WN_2ZXEHXJ-RKWkEM5I-Q-5Aw

3. Once you RSVP for the Zoom webinar in Step 2, you will receive an email with instructions on how to attend the webinar on the day of the event.

NOTE: If you have not renewed for the 2023-24 season, you will need to purchase a non-renewed member ticket or renew your membership ASAP.

Applications are pending for 2.0 continuing education credits for CFP, NJ CLE, and NJ CPE. If you wish to receive CE credits, you must provide the necessary license information, and you must attend the full course.