

Tom Rogerson

President and Founder



Tom is a recognized leader and pioneer in family governance and legacy planning. He had the privilege of meeting Jay Hughes over 30 years ago who inspired him to transform his practice from “Preparing the Money for the Family” to “Preparing the Family for the Money.” Using his Seven-Steps to Healthy Family Governance, Tom has worked with over 300 families facilitating family meetings focusing on: creating a legacy culture with an entrepreneurial mindset, philanthropic vision, legacy planning, succession development and endowing the process for the future, all to create a generational family.

In 2017 Tom teamed up with his wife Cathy, a certified relationship coach, and started GenLeg Co., Inc. Together they provide guidance and education to families and their advisors, helping them transition significant capital, both financial (tangible) and human (intangible), from one generation to the next.

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 into the fabric of the client relationship. 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, The Catholic Foundation, numerous estate planning councils, as well as many other organizations.



CONTACT INFORMATION

Phone: 617.688.2029

Email: Tom@GenLegCo.com

EXPERTISE IN:

- Strategies for Defining & Implementing Family Legacy Planning
- Creating and Maintaining a Family Entrepreneurial Mindset
- Managing Family Conflict
- Creating a Family Governance Process
- Family Education and Communication
- Family Philanthropic Planning and Implementation
- Family Coaching and Moderating Meetings
- SPIN and Challenger sales training and messaging
- Licensed in ILS and DISC