LEGACY CAPITALS
Trusted by families and their advisors

About Richard Orlando, Ph.D.

For the past quarter century, Richard Orlando, Ph.D., founder and CEO of Legacy Capitals LLC, has worked globally with executives, entrepreneurs, and professional athletes, as well as families, work teams, and organizations, who strive for success or have already reached significant levels of success.

Author of *LEGACY: The Hidden Keys to Optimizing Your Family Wealth Decisions,* Richard Orlando serves as a trusted advisor, consultant, and coach to high net worth and ultra high net worth individuals and families—some of which lead very successful family businesses. In addition, he has worked with *Barron's* Top 100 Financial Advisors, as well as leaders and high performing teams nationally and internationally.

Dr. Orlando has an interdisciplinary background, holding degrees in computer science, business, and psychology. After earning a Bachelor of Science degree in computer science and business from St. John's University, he pursued a career on Wall Street and earned his Series 7 and 63 licenses. Returning to school, he received a master's degree in counseling/theology from Trinity International University. Continuing his education, he earned a doctorate in family systems from Seton Hall University, during which time he interned with the New York Giants football team. His dissertation research focused on wealth management family teams. Dr. Orlando also earned a certificate in family wealth advising from the Family Firm Institute and holds a certified professional coach designation from an International Coach Federation accredited program.

He has been referenced in numerous publications including the *New York Times*, *Bloomberg Business*, *Wall Street Journal online, Trusts & Estates, WealthManagement.com, ThinkAdvisor, Family Business Magazine, Private Wealth Magazine, Family Wealth Report*, *Private Wealth Focus*, *Chicago Tribune*, *CFA Magazine, Merrill Lynch Advisor, Research, Bloomberg Wealth Manager, On Wall Street*, and *Registered Rep*. He has conducted hundreds of presentations to various groups and organizations, including the Family Office Association (FOA), Family Office Exchange (FOX), Family Business Alliance, Morgan Stanley, UBS, Merrill Lynch, U.S. Trust, HighTower, Dynasty Financial Partners, Fieldpoint Private, Odin, Feldman, and Pittleman law firm, Vorys, Sater, Seymour and Pease law firm, Purposeful Planning Institute, Kegler, Brown, Hill and Ritter law firm, Janney Montgomery Scott, YUM! Brand executives, Wealth & Legacy Group, Young Presidents Organization, and Vistage International. He has also spoken at various industry conferences such as the NY Chapter of Exit Planning Institute, Philadelphia Financial Planning Association (FPA), Estate Planning Council of NYC, NJ Financial Planners Association, Barron's, Attorneys for Family-Held Enterprises, Securities Industry Institute, and Investment Management Consultants Association.

Dr. Orlando is on the board of director's at Urban Hope in Staten Island, New York. He was born and raised in New York City, and currently resides in Bucks County, Pennsylvania, with his wife and their children.