

## **Bio -- Thomas C. Rogerson, Family Integrated Wealth Solutions, Boston, MA**

Thomas Rogerson is a recognized leader and pioneer in family governance throughout the world, Tom uses his “5 Steps to Healthy Family Governance,” to assist families with communication, philanthropic vision, legacy planning, succession, and education. Tom incorporates these critical issues into a client’s comprehensive wealth management plan, not only helping to prepare the money for the family, but to also prepare the family for the money. He brings more than three decades of experience to the wealth management industry where he has provided guidance and education to families, helping them transition significant capital, both financial and human, from one generation to the next.

Prior to starting his private practice, Tom was with Wilmington Trust, bringing his wealth management expertise as both a speaker and motivator to not only families but to Wilmington’s client-facing teams, helping them integrate Family Governance into the fabric of the client relationship, from introduction to full implementation. He created unique messaging utilizing both the Challenger Sale and the SPIN model to motivate prospects, centers of influence, clients, and internal teams towards his integrated approach to managing family wealth. Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors in Boston, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor’s in Economics from Ithaca College.

Tom is a much sought-after international speaker on the topic of family governance for wealthy individuals and entrepreneurs. Engagements include: The Young Presidents Organization, The World Presidents Organization, Harvard University Business School, Tiger 21, 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, as well as many other organizations.