



THE ESTATE PLANNING COUNCIL
OF SUFFOLK COUNTY, INC.

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Please Join Us
Family Love Letter:
An Intergenerational Wealth Transfer Program

Date and Time:
Wednesday, June 8, 2022
5:30pm – 7:30pm EST

Location:
Encore Luxury Living
300 Jericho Turnpike, Jericho,
NY 11753

Please join us for a presentation at a special location, Encore Luxury Living, located in Jericho. A Zoom link will also be provided with your RSVP confirmation in the event you cannot attend in-person. Drinks and appetizers will be served. We hope to see you there!

Speaker Information

Cheri Brooks, Neuberger Berman Senior Vice President

The Family Love Letter is an intergenerational wealth transfer program designed to pave a path for individuals to deepen their relationships and change the conversation with the entire family. It is a roadmap which employs a “storytelling” process to gather pertinent information. The program is also designed to build alliances with attorneys, CPAs and other centers of influence, creating a forum to cross-pollinate referrals while opening the door to the next generation of wealth.

What makes the Family Love Letter program different?

- Differentiates your practice by positioning your team as the Family’s Primary Provider
 - Initiates family conversations up & down generations
 - Adds human element to difficult, uncomfortable topics
 - Engages the spouse / typically family’s emotional gatekeeper
- Hosting client events in a virtual setting eliminates the geographic constraints advisors tend to face with meeting the adult children

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