

What you have learned is as valuable as what you have earned ...

How would you like your family to pass down your legacy to succeeding generations? What do you want your children and grandchildren to know about your life, your values, your hopes and dreams for the future?

You and your professional advisors work hard to insure that your legal and financial planning is up to date, tax efficient, transparent, and will support all that you dream about for your business, your family, your community and your life.

Your advisors assemble important data for you and draft documents that are critical during, and after, your life. Essential as those charts and legal documents are, however, there is something vital missing from them: *the sound of your own voice*.

Writer, author and speaker Susan Turnbull will be introducing us to how the modern application of the ancient instrument of the Ethical Will provides a natural, meaningful and loving means to consider and transmit our non-material wealth.

Your legal will addresses you what want your loved ones to have. Susan will inspire us to understand the ease with which we can also address what we want our loved ones to know – now and forever.

Meet the Speaker: Susan Turnbull, Personal Legacy Advisors

Susan Turnbull is the founder of Personal Legacy Advisors and author of *The Wealth of Your Life: A Step-by-Step Guide for Creating Your Ethical Will*. A former journalist, she is a nationally known advocate for the creation of personal legacy documents as an integral part of estate and financial planning, including Ethical Wills, philanthropic mission statements and letters of guidance for trustees, guardians and executors. She speaks widely on the topic and her firm, Personal Legacy Advisors, provides guidance and writing support for those who wish to address more than just the financial dimensions of their life and legacy. She has been featured in articles in the *Christian Science Monitor*, *AARP Magazine*, *The Wall Street Journal* and *Money Magazine*. Married for 27 years and the parent of three young adult children, she divides her time between Boston, MA and Charleston, WV.

Read what people are saying about Susan Turnbull and “The Wealth of Your Life” ...

The Wealth of Your Life: A Step-by-Step Guide for Creating Your Ethical Will

“This is a visually stunning book with immense heart. It manages to be both inspirational and practical at the same time. Susan Turnbull has succeeded in crafting the perfect guide to one of the most loving acts we can do for our family – creating an Ethical Will. I recommend it highly to the families I work with.”

Dr. Jim Grubman, Family Wealth Consulting

Presentations

“While I was enthused and supportive of your Ethical Will long before our seminar, I can tell you that I am now your greatest advocate. From our firm’s partners and our own spouses, to each and every client who attended, the response was an overwhelming: ‘A true home run.’”

Robert Wermuth, Legacy Planning Partners

“Susan Turnbull gave an excellent presentation to our donors and friends on Ethical Wills. Her presentation included the history of Ethical Wills, a clear explanation about why they are important and poignant examples. She did an outstanding job of incorporating the relevance and importance of philanthropy in her presentation. Attendee responses were uniformly positive, and our donors left feeling motivated to take the next step. “

Nadia Yassa, Boston Foundation

Client testimonial

“You did a wonderful job of helping us capture our feelings on some very personal issues, including a couple where we would have had a difficult time finding consensus without your wise guidance, and your writing skills made the final product much more elegant than it would have been otherwise.”

Entrepreneur and philanthropist, age 52

On the concept of an Ethical Will:

“I can think of no better way to end this book than to recommend that you undertake the composition of an ethical will. No matter how old you are, it can be an exercise that will make you take stock of your life experience and distill from it the values and wisdom you have gained. You will then put the document aside, read it over as the years pass, and revise it from time to time as you see fit. Certainly an ethical will can be a wonderful gift to leave to your family at the end of your life, but I think its main importance is what it can give you in the midst of your life.”

Dr. Andrew Weil, MD

Healthy Aging: A Lifelong Guide to Your Physical and Spiritual Well-being