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Leaving a Legacy Beyond Inheritance: A Financial Education Webinar

Join a free financial education webinar on the non-investment side of multi-generational wealth management.

Josh Kanter, keynote speaker at this event, specializes in multi-generational wealth management.

NEW YORK CITY, NEW YORK, UNITED STATES, June 23, 2021 /EINPresswire.com/ -- Most legacy planning is hyper-focused on the assets of the estate with little consideration for the legacy of values and relationships the testator leaves behind. In the grand scheme of things, the monetary value of your legacy is a very small part of what you leave for your heirs. Join a free financial education webinar on the non-investment side of multi-generational wealth management. This event, hosted by financial concierge service Advice Chaser, will premier at 11 a.m. Pacific Time on June 29. Be sure to reserve your place at the event here.

Advice Chaser has invited Josh Kanter, who specializes in multi-generational wealth management, to be the keynote speaker. As the Principal of Josh Kanter Wealth Advisory Services and President of Chicago Financial, Inc., Josh has expertise in managing wealth in a way that enriches lives. In his presentation, he'll share wisdom in the following areas:

- How to involve family members, especially your teenagers, in financial education
- What it means to have a goal-oriented estate plan
- Tips to start honest, transparent conversations with your heirs about wealth structure and responsibility
- How to craft a family vision and philanthropy statement that will last for generations
- Non-wealth legacy assets to consider, such as community impact, human capital, and traditions

"Josh has a long-term view of finances and their impact, which is why we're excited to share this presentation. He knows that your legacy is so much more than the money you leave your kids; it's the essence of how you lived your life. If you want to have unified family financial goals that will benefit your children, your grandchildren, and your community for decades to come, this event will help you get an idea how to begin," said Megan Coelho, President of Advice Chaser.

Advice Chaser Offers Consumers an Easy Way to Find the Best Professional Financial Advisor

To preserve your legacy, one of your best strategies is to consult a financial advisor. Advice Chaser can match you with a financial advisor who has specific experience in working with other clients who are passionate about creating a wealth legacy that will last long into the future. [Book an initial consultation today.]

About Advice Chaser

Advice Chaser is an independent financial concierge service. Our mission is to improve your investment experience by helping you access better financial advice. We listen to your specific needs and goals in order to offer you a custom-tailored connection to reputable advisors. Think of us as a boutique financial dating service.

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Megan Coelho, President of Advice Chaser

Unlike other investor-matching services, we do not sell recommendations. Advisors pay to be considered for our select list, but they can't purchase a place there. We keep only consistently reputable advisors on our shortlist. To see what we can do for your future, [see our services here].

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