

# Secure Your Family's Future

We provide independent holistic advice on wealth preservation, succession planning and family wellness to give our clients peace of mind and to ensure harmony through generations.



*Legacy  
Wealth  
Advisors*

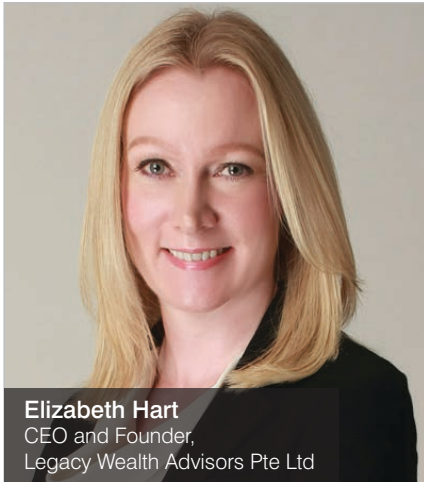
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# PUTTING CLIENTS BACK AT THE CENTRE

**Elizabeth Hart**, CEO and Founder, **Legacy Wealth Advisors Pte Ltd**, talks to **Tom Burroughes**, *WealthBriefingAsia* Group Editor.



**Elizabeth Hart**  
CEO and Founder,  
Legacy Wealth Advisors Pte Ltd

**W**e are delighted to win this award which is an important recognition of our dedication and hard work. We turned the adversity of COVID-19 into an opportunity to innovate and develop a new business model for our industry.

Legacy Wealth Advisors is a boutique firm providing independent holistic advice on wealth preservation, succession planning and family wellness to support wealthy families to ensure harmony through generations.

Legacy Wealth Advisors and its sister company The Life Academy have developed a unique holistic approach, which puts the client back to the centre and is having a meaningful impact on their lives.

*Our services bring together:*

- a) **Wealth management** to preserve and prudently grow wealth. This service is delivered via a multi-family office in Singapore providing independent investment advice and incubator single-family office services.
- b) **Succession planning** to create a smooth transition of wealth. Legacy Wealth Advisors was established in 2020 to meet demand from clients and professional advisors for a

holistic succession planning consulting service and independent directors to support families to ensure a smooth transition of wealth.

- c) **Family Wellness Programs** to enhance family relationships, to support the well-being of family members to ensure harmony through generations, and prepare the next generation for being future wealth owners.

The Life Academy was established in 2008. We hold inspiring events in Asia and provide one-to-one coaching to empower people to achieve their full potential and to live with purpose and fulfillment.

During the pandemic, we launched our Family Wellness Program to help wealthy families to enhance family relationships and to support the pro-active well-being of individual family members in all aspects of wellbeing to live with purpose and fulfillment.

Our wellness program has had a profound impact on our clients. Our holistic approach gives families peace of mind with a strategy to preserve and prudently grow their wealth, a clear and effective succession plan, and enhanced harmony within the family.

"The outcome is no less than sensational and we are grateful for your sound and measured guidance." A key client across our three businesses.

**What have been the challenges you have had to overcome to reach such a standard?**

A key challenge was finding space for creativity and having the courage to step out of a senior corporate role.

After over 30 years in the industry, I felt there was a need to focus on more than monetary returns. In my view, wealth is about more than money. There are many examples of families who have lots of money but they are not wealthy.

In order to preserve wealth and ensure a smooth transition of wealth to a prepared next generation, it is important to empower individuals in all aspects of well-being to be in harmony with themselves, their family, and the world around them and to prepare the next generation for being future wealth owners.

I am one of the few professionals who understands both wealth management and trust and is an experienced empowerment coach. I felt a calling to join the dots and to share my experience to add real value to clients. I have finally found my purpose and the missing piece of the puzzle to provide clients with a unique holistic offering.

**How has your business and business model reacted to the pandemic? Have you introduced new working practices that will endure?**

During the pandemic, I thought about two words; gratitude & reflection. We turned the adversity of Covid-19 into an opportunity to innovate and develop a new business model for our industry. ■

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