Legacy Wealth Advisors

Wealth

Independent Investment Advice:

- Preservation & prudent growth
- Tailored solutions
- Simplicity amongst complexity
- Expertise working for you
- Full alignment to clients
- Transparency of fees
- Reduce Costs

Investment Oversight

Incubator Family Office/ Private Investment Office

Legacy

Succession & Governance:

- Bespoke global structures for a smooth transition of wealth, asset protection, relocation, and tax planning.

- Value-based governance to enhance family harmony.

Wellness

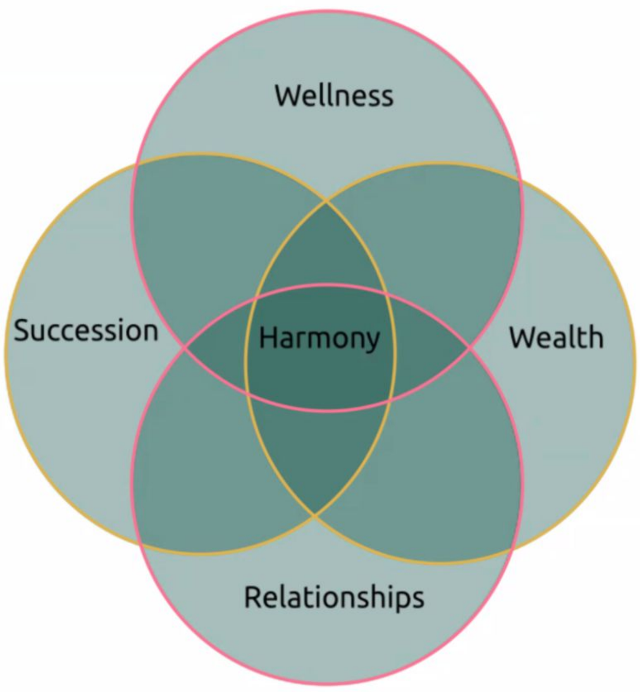
Family Wellness Programmes:

- Enhance family relationships
- Wellbeing of family members
- Empower each generation
- Find Purpose & Abundance

Next-Gen Ownership

- 1-1 self-mastery coaching
- Online courses
- Inspiring events

The Legacy Model



How can families ***preserve*** and ***prosper*** for enduring harmony through generations?

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Biography & Contact Details

Elizabeth has dedicated her entire career, of over 35 years, to advising private clients and provides holistic advice on wealth preservation, succession planning & family wellness.

Elizabeth is the CEO & Founder of Legacy Wealth Advisors Pte Ltd, an award-winning independent private office that bridges the gap between financial returns and family wellness. In a landscape of fragmented advice and institutional conflict, we provide a single point of clarity—bringing transparency, cost-efficiency, and grounded advice to international wealth. Our clients share our values and recognize that enduring legacy requires more than financial structures; it requires intergenerational harmony. Legacy Wealth Advisors was awarded Independent Wealth Manager, South East Asia at the WealthBriefing Awards 2024 and Most Promising New Entrant at the WealthBriefing Awards 2022.

Elizabeth is an independent non-executive director of British & Malayan Holdings Ltd, an SGX listed company established since 1924 and a pioneering member of the Singapore Stock Exchange. Elizabeth sits on the judging panel of the Financial Times PWM Global Private Banking Awards, the WealthBriefingAsia Awards and the WealthBriefing European Awards. She is also an Ambassador for WealthiHer and Ladies Finance Club.

Elizabeth is an Associate of the Chartered Institute of Bankers, a member of the Society of Trust and Estate Practitioners, a member of the Singapore Institute of Directors. Previously, Elizabeth has held senior managerial positions including Managing Director, Head of South East Asia, Rothschild Wealth Management and Director, Rothschild Trust for 12 years until 2016. Elizabeth has been advising families in Asia & Australia for over 25 years. Elizabeth was awarded Banker of the Year in 2000 and Thought Leadership for Wealth Management in 2026.

WealthBriefingAsia AWARDS 2026 — WINNER Thought Leadership (Individual)

WealthBriefingAsia AWARDS 2024 — WINNER Independent Wealth Manager (South-East Asia)

WealthBriefingAsia AWARDS 2022 — MOST PROMISING NEW ENTRANT - SOUTH-EAST ASIA — WINNER Legacy Wealth Advisors