SCHOLAR ADVISING
LEGACY COACHING

Introducing the Legacy Coaching Experience

A six-month investment in your family's future.

Preserve, Protect, and Pass On Your Wealth with Confidence

Your wealth represents decades of achievement, discipline, and care. The Legacy Coaching Program helps you translate that success into something lasting — a plan that equips your heirs, strengthens family connections, and protects what you've built for generations to come.

This six-month, flat-fee program brings together financial planning, family education, and coordinated advisory support, all designed to help you leave a legacy that is both strategic and meaningful.

Your Legacy Experience

A Holistic Wealth Plan for You
A comprehensive plan covering investments, taxes, estate strategy, and philanthropy, grounded in your family's values and goals.

Individual Financial Plans for Heirs
Each heir receives a personalized plan suited to their age, responsibilities, and financial maturity. We meet them where they are and guide them toward long-term confidence.

Guided Family Meetings
We facilitate structured conversations to align expectations, clarify intentions, and foster understanding between generations.

Financial Literacy Education
Your heirs learn essential skills for wealth management, from investing and taxes to financial decision-making and stewardship.

Ongoing Guidance and Coordination
We work alongside your attorney, CPA, and other advisors to ensure your plan is implemented and your legacy is protected.

Your Six-Month Legacy Journey

Months 1–2: Foundation

We begin by learning about your family's goals, relationships, and values. You'll receive a comprehensive wealth plan that aligns your financial strategy with your legacy vision. The first family meeting introduces the process and establishes shared understanding.

Months 3–4: Engagement

Each heir receives their own personalized plan, supported by one-on-one conversations and interactive education sessions. These months focus on building confidence, understanding financial responsibility, and encouraging healthy dialogue.

Months 5–6: Implementation

We bring together your complete legacy framework, coordinating with your estate attorney, CPA, and other professionals. The program concludes with a closing family meeting and presentation of your long-term legacy roadmap.

The Goals of Legacy Coaching

- Clarity: Your family's wealth strategy fully aligned with your vision and values.
- Confidence: Heirs who are prepared to manage wealth responsibly.
- Continuity: A plan designed to protect and grow wealth across generations.
- Coordination: Expert guidance across every aspect of your financial life.

Your Investment in Family Legacy

The Legacy Coaching Program is a $40,000 investment for a six-month engagement.

This fee includes comprehensive planning for you, individualized guidance for your heirs, family meeting facilitation, and coordination with your other trusted professionals.

For current clients of Scholar Advising, the cost of your initial plan or annual renewal may be applied toward enrollment in the Legacy Coaching Program within 30 days following your initial plan or annual renewal presentation.

This program represents more than financial planning. It is a meaningful commitment to preparing your heirs, protecting your wealth, and ensuring your legacy endures.

Next Steps

We're honored to help families like yours create clarity, continuity, and confidence for future generations.

To explore whether the Legacy Coaching Program is the right fit for your family, please complete our brief initial contact form. Once received, our team will connect with you to schedule a consultation where we'll learn more about your goals, answer your questions, and outline how we can work together to preserve and strengthen your family's legacy.

If we have not yet had the pleasure of working with you, please begin by completing our Proposal Intake Form. This form is required prior to your consultation and allows us to tailor our conversation to your family's unique goals and circumstances.

Request Your Consultation