Did you ever think that transition and sustainability planning for your family – whether you want a legacy that lasts 50 years or need to assure that your family business endures – could be interesting and actually add to your enjoyment of life? I invite my clients on a journey that does exactly that.

Kathleen C. Peer, JD, CFP®
Managing Director

A second generation attorney and spouse of an attorney Kathy frequently noticed that traditional estate planning – and the business transition planning that often accompanies it – was a cumbersome, uncomfortable and uninspiring process. Seeking to add value, help families communicate more effectively towards common goals and lessen the customary concentration on "death and taxes" – Kathy found that her highly affluent clients were hungry for ways to use their wealth to make a difference in the world and in the lives of their loved ones.

This observation gradually led Kathy to shift her practice exclusively to strategic wealth preservation and enjoyment. Her clients benefit from her ability to facilitate conversations within families around complex and sometimes difficult subjects so that they can focus on what is really important to them. This can include clean transition in family business leadership, clear pathways for preserving assets for the third and even fourth generations and focused community and philanthropic activity that brings the family closer together. Conflicts of all sorts – momentary and long-term, overt and hidden – hinder families in their ability to sustain and enjoy their wealth. Kathy shares specific tools that help resolve these conflicts, connect the generations and enable family members to flourish, rather than fracture. She believes that ***Planning with Purpose*** can transform families.

With over 30 years of experience in working with affluent individuals and families, Kathy is a skilled facilitator, thoughtful listener and expert coordinator. She takes away much of the complexity and overwhelming information usually associated with traditional estate, transition and sustainability planning and replaces it with excitement and purpose. She also weaves together the work of various experts and trusted family advisors – attorneys, accountants, bankers and risk managers – and collaborates with them to form a custom Wealth Preservation Blueprint. This document shows families all the elements of their plans, their purposes and how they relate to each other at a single glance.

Not infrequently, Kathy's clients find that closer family relationships are a direct outcome of their work with her. Added to the significant savings – often millions of dollars – this makes working with Kathy very valuable indeed.

When she is not travelling to meet with clients or to one of her frequent speaking engagements, Kathy divides her time between Stuyvesant, New York and Manhattan.

EDUCATION, PROFESSIONAL LICENSES, PROFESSIONAL AFFILIATIONS

- Juris Doctor, Albany Law School, Union University
- Bachelor of Arts, Nazareth College, Rochester, NY
- Certified Financial Planner designation. International Board of Standards of the IBCFP
- Member: Institute of Certified Financial Planners (ICFP), 360 Practices, an Estate Planning National Collaborative, Advisors in Philanthropy and Purposeful Planning
- Member: New York State Bar Association, American Bar Association

COMMUNITY INVOLVEMENT and PHILANTROPHY

- Member, Advisory Board, Wildwood School for Autistic Children
- Co-chair, Planned Giving Committee New York Junior League
- Member, Advisory Board, Double H Hole-in-the-Woods Ranch

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