

Family Love Letter

Dealing with the death or the disability of a loved one is stressful; not knowing what to do with the deceased's finances in the aftermath imposes an additional burden on a family.

The **Family Love Letter**[®] is an intergenerational wealth transfer program designed to help your clients in what is often a time of confusion. It is a roadmap that employs a "storytelling" process to gather pertinent information. The goal is to help minimize the types of inadvertent mistakes that often occur during times of turmoil.

CONSIDER THESE STATISTICS:

80% | of married women will outlive their husbands¹

9 in 10 | women will be solely responsible for their own family's finances at some point in their lives²

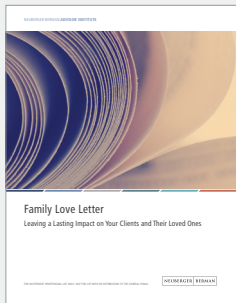
90% | of inheritors decide not to use their parents' advisor³

Neuberger Berman Advisor Institute (NBAI) will partner with you to provide the following:

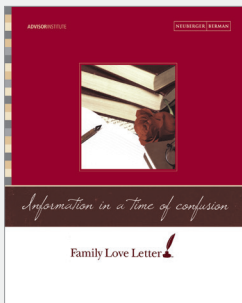
- **Public Seminar:** An NBAI representative will introduce clients and referral sources to the program. The goal is to create an emotional connection with the audience and encourage them to take action by sharing a series of real stories from a variety of life stages. Neuberger Berman will guide you from start to finish in hosting the event.
- **Professional Partnerships:** Additionally, Family Love Letter seminars are designed to build alliances with attorneys, CPAs and other centers of influence, creating a forum to cross-pollinate referrals while opening the door to the next generation of wealth.
- **One-on-One Client and Prospect Meetings:** At the close of the Family Love Letter event, NBAI will create a call to action. The goal is to direct the audience back to you and your team. By identifying where the "gaps" are in their Family Love Letter, the program creates an opportunity for follow-up office appointments with clients and prospects.

Program Components

Best Practices Brochure

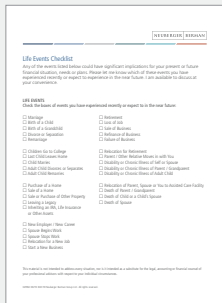


Family Love Letter Workbook

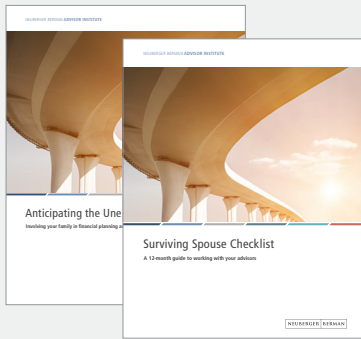


Supplemental Resources

Life Events Checklist



Anticipating the Unexpected & Surviving Spouse Checklist



Family Love Letter

Leave a Lasting Impact on Your Clients and Their Loved Ones

Hosting a Family Love Letter event offers a unique opportunity for you to connect with your clients in a meaningful way.

Below are some examples of successful event concepts:

- Private Dinner Receptions
- Foundation Board Meetings
- Community Club Luncheons
- Planned Giving Seminars

Over the years,

Family Love Letter

has been lauded in

The Wall Street Journal,

Medical Economics,

Redbook and CNBC.

The resource is available

in hard copy and

single-use thumb drive.

Neuberger Berman Advisor Institute

Building a better advisory practice is an evolving mission. It demands time, discipline and a desire to continually reach your clients with meaningful, relevant information. The Neuberger Berman Advisor Institute (NBAI) works hand-in-hand with many of the nation's leading advisory groups to deliver effective practice management solutions. Whether you are looking for a one-time consulting session or to develop a series of meetings, NBAI can work with you to develop a customized plan to meet your needs.

Management Team



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Senior Consultant

FOR MORE INFORMATION, PLEASE CONTACT YOUR NEUBERGER BERMAN REPRESENTATIVE OR VISIT US AT WWW.NB.COM

¹ U.S. Census Bureau, Current Population Survey, 2016.

² ICMC "Why we need to bridge the financial literacy gap between women and men," 2016.

³ Cerulli Associates, The Cerulli Edge - U.S. Retail Investor Edition, 2019.

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