
The FORUMS | Enduring Wealth, Enduring Values

THE LEGACY FORUM

[Legacy Forum Homepage](#) | (425) 492-4300 | info@thelegacyforum.com



BUILDING ENDURING WEALTH

We understand that our clients are in great hands with expert financial advisors and lawyers. Your smart choices have played a key role in building and safeguarding your wealth, reflecting your wisdom and savvy. While you rightly take pride in your accomplishments, your ultimate goal is to see your family flourish, succeed, and find genuine happiness.

Wealth is important, but it isn't the sole ingredient for happiness or ensuring the success of your family's future generations. The Legacy FORUMS are for individuals, couples, and families whose prime objective is to build lives of virtue, purpose, passion, and enduring legacies in partnership with The Legacy Forums.

THE FORUMS APPROACH

Our FORUMS are meticulously curated events held in carefully chosen venues. During these gatherings, we engage in a dynamic process that involves exploration, discussion, goal-setting, and self-discovery. The retreats, in partnership with regular virtual sessions, serve to delve into understanding your current life stage and circumstances, uncover insights about your aspirations, and tailor your unique path forward in legitimizing your legacy.



THE LEGACY
FORUM

Ensuring Your Legacy

Ensuring your legacy and growing the foundational values necessary for it to persevere throughout the coming years starts with your commitment and resolve to take those first steps. The Legacy Forum Team is here to help you start down that path. Joining the Legacy Forum program begins with an application process. The purpose is to determine if the partnership will be beneficial for you in this season of your growth. We believe our guidance and experience should only be used by providing them to people who are serious about their Legacy.

INTERVIEW

Once you contact The Legacy Forum, we will begin your application process. Completing the application is essential before we discuss participation and associated costs. Following this, a Senior Advisor will schedule a Zoom call to review your application and address any questions, with no final decision made at this stage. After a week of reflection, if both parties agree to proceed, we'll discuss the next steps and requirements to embark on this exciting journey together.

YOUR JOURNEY

Clients have the flexibility to select from three distinct FORUM options tailored to their specific needs and goals: The Legacy Journey, The Legacy Foundation, and The Legacy Quest. Each FORUM offers unique insights and strategies designed to empower clients in different aspects of their journey towards building enduring legacies and achieving personal and familial growth.

FORUMS	Description	Features
The Legacy Journey	The Legacy Journey, is a 12 month program designed for individuals, couples, and families. Its goal is to build an enduring legacy by deeply and purposefully addressing every aspect of legacy building.	<ul style="list-style-type: none"> • Four retreats <ul style="list-style-type: none"> ◦ Initial Retreat: 5-6 days ◦ Mini Retreats: 3 retreats, 3-4 days each • Pre-retreat Virtual Sessions: 3-4 • Post-retreat Virtual Sessions: 20-25
The Legacy Foundation	The Legacy Foundation is a 100 day program that follows the same structure as The Legacy Journey. It can be experienced individually, as a couple or in a group of 6 or less.	<ul style="list-style-type: none"> • One retreat: 4-5 days <ul style="list-style-type: none"> ◦ Optional 2-3 day mini retreat available for add-on • Pre-retreat Virtual Sessions: 2-3 • Post-retreat Virtual Sessions: 10, one session scheduled weekly for 10 weeks
The Legacy Quest	The Legacy Quest is tailored for clients aged 22-35, and centers on discovering individual talents and character strengths to nurture strong leadership within their families and solidify their future legacies.	<ul style="list-style-type: none"> • One retreat: 4-5 days • Pre-retreat Virtual Sessions: 2-3 • Post-retreat Virtual Sessions: 10, one session scheduled weekly for 10 weeks