

Helping Advisors Turn Perfect Strangers into Perfectly Engaged Clients for Nearly two Decades



Todd Fithian is a 20 year veteran of the financial services industry. Following in the footsteps of three generations, Todd knew at an early age his calling was not only to work in the industry, but to work to improve it as well. A lifelong entrepreneur, Todd formed his own wealth advisory firm in Boston soon after graduating from The University of Massachusetts, than later joined forces with his late brother Scott in 1996 to form The Legacy Companies a professional training and consulting organization.

Legacy's turn-key systems and processes are designed to enhance the way wealth advisors engage clients by clarifying first WHAT and WHY a client wants to accomplish before jumping into HOW to solve it. Fithian calls this *Above the Line Conversations*. He has consulted and trained literally thousands of advisors, several large financial institutions, and families in the United States, Canada, UK and Australia in his unique approach.

Today, as the Managing Partner of Legacy Todd provides the *VISION* and *LEADERSHIP* for his team. In 2007 Fithian Co-Authored his first book *The Right Side of the Table: Where do you sit in the minds of the Affluent*. In 2011 he wrote *The Future of You: Providing Clarity Where Life Intersects Wealth*, in collaboration with 19 members of his Legacy Wealth Coach Network who have integrated these principles into their practices. His work has been published in several trade magazines and most recently The Wall Street Journal and USA Today. Todd is nationally recognized for his contributions to the industry and is a frequent speaker at industry conferences throughout North America.

Todd currently serves as a board member of the American Colleges, Chartered Advisor in Philanthropy (CAP) and is the current president of the International Association of Advisors in Philanthropy.

Todd and his wife Debbie have four children, Andrew (16), Ryan (13), Kelly (10) & Will (5). When he's away from his work, Todd is often found in a hockey rink behind the bench coaching or on the lacrosse field being a proud dad. He has a daily goal of living each day like it could be his last.