



Family Business and Wealth Speaker

Keynotes • Presentations • Workshops



Jeff Savlov is a creative, dynamic, experienced speaker with a unique background including his family's commercial printing business in NYC, a separate, successful career in sales and marketing, graduate work in family systems and group dynamics, training as a family therapist and certified psychoanalyst and a niche consulting practice serving business and legacy families at the intersection of family dynamics and business/wealth. His presentations often include innovative references to popular culture that clearly explain complex ideas, making them fun and easily understood by audiences.

Speaking Topics

Some of the family business and wealth topics I speak on are below. My talks can be tailored for families, professional advisors or both in a variety of format lengths and structures.

Raising Children in the context of Financial Success

Cutting-edge research, helpful anecdotes and practical, actionable advice for parenting in the challenging context of wealth.

Rock 'N Roll Lessons in Family Business/Wealth

Creative, entertaining and powerfully educational. Using documentary video clips families and professionals will learn what it takes for families to be successful across generations and how their professionals can help or hinder them. Includes video examples of a family and its advisors.

Managing Conflict and Family Business/Wealth

Attendees will learn various ways to understand the pressures on families when they share significant assets, how to manage normal conflict and minimize it into the future.

Successfully Working Together and Making Generational Transitions in Family Business/Wealth

Learn the practices of successful families who have transitioned family business/wealth across generations. Understand the underlying dynamics that make it so challenging.

Previous Speaking Engagements Include:

- Purposeful Planning Institute - Annual Rendezvous and Fusion Meetings
 - Family Firm Institute – Global Conference
 - UMass Amherst Family Business Center
 - The Family Business Network
 - Family Office Club
 - National Association of Estate Planners and Councils
 - Vistage
 - Prairie Family Business Association
 - Baruch College
 - Shenandoah University
 - Philadelphia Bar Association
 - Helm Society
 - Exit Planning Exchange
 - Psychodynamics of Family Business
 - Numerous professional firms (law, accounting, wealth management and more)
- [Click here](#) to see more

Testimonials

“Jeff Savlov has presented at the Purposeful Planning Institute on multiple occasions. Jeff is a dynamic speaker who understands both the beautiful complexity of family dynamics and the interplay between business succession, flourishing families and legacy planning. His enthusiasm, creativity, humor and substance make him a great presenter.”

John "John A" Warnick, Counselor and Attorney at Law, Founder of the Purposeful Planning Institute

“I’ve collaborated with Jeff on several occasions, and I attended a few of his workshops. I find Jeff and his work inspiring. His intellectual curiosity harmoniously pairs up with his in-depth knowledge of individual behavior and family interaction. This allows him to capture innovative educational needs for enterprising families and their advisors, and to address them with elements of originality.”

Gaia Marchisio, Ph.D., Executive Director, Cox Family Enterprise Center, Kennesaw State University

...“we selected [Jeff] after searching around New York City for the most credible and experienced family business advisors.”

Richard C. Wilson, CEO, Family Office Club

“His intelligence, humor and ability to connect the dots makes him a very effective teacher and guide.”

Ira Bryck, Director, UMass Amherst Family Business Center

“In all, your presentation was among the most interactive and participatory of continuing education sessions we’ve hosted in recent years.”

Jonathan F. Justice, Vice President 2017-18, Estate Planning Council of Bergen County, Inc.

EVOLVING FAMILIES • BUSINESS/WEALTH • PRINCIPLES, PURPOSE, PASSION

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