PRATT
LEGACY
ADVISORS

ALAN W. PRATT

President

Alan Pratt, CEP, CAP is a family legacy advisor specializing in philanthropy and family wealth preservation. He brings a unique blend of personal experience and technical knowledge to the estate planning process. Alan helps families understand, in plain English, their options for preserving wealth in a way that honors their underlying values. Alan's company, Pratt Legacy Advisors practices a unique form of estate planning that goes far beyond strategic wealth distribution. Alan believes that a meaningful estate plan comes from knowing your values, living your values, and planning from your values. His firm has created Legacy Planning from the Heart,™ a process to help you integrate your life experiences with your estate plan, while maintaining ongoing communication within your family. He holds trust, listening, and life-long relationships as core values in everything he undertakes and shares from his own personal experiences.

Alan is in demand as a speaker at regional, national, and international conferences dealing with family relationships, wealth preservation, and stewardship. He is recognized as a leader in Advanced Life Insurance designs, which is often used as a strategy to responsibly transition family wealth.

He earned his Chartered Advisor in Philanthropy designation in 2006 and currently serves as the Chief Ambassador of The International Association of Advisors in Philanthropy (AIP). In 2007, he became a founding member of the Seattle Philanthropic Advisors Network (SPAN) and currently serves on the Board as Vice President. He is an active member of the National Institute of Certified Estate Planners, Washington Planned Giving Council, and the Seattle Chapter of the National Association of Insurance and Financial Advisors. Alan serves on the Advisory Board of the Chief Seattle Council–Boy Scouts of America and the Seattle Christian Community Foundation. Alan and his wife, Helen, were married in 1984 and have 3 children. You can reach Alan by email at alan@prattla.com or by phone at 425-455-0999.

INSPIRATIONAL SPEAKER

Speaking

As a recognized industry leader, Alan is in demand as a speaker at regional, national, and international conferences dealing with family relationships, wealth preservation, and stewardship. In addition, he is well known as an expert in Advanced Life Insurance designs which is a key component in successful family wealth transition plans. Alan's audiences include wealthy individuals and families interested in creating their personal legacy plans, as well as, professional advisors who desire to better serve and bring added value to their client relationships.

The following is a list of topics that Alan has spoken on this past year. He continues to build this list based on the demand he receives for presentations to address interests of wealthy individuals and families.

Current Presentations Offered

- Turning Your Life Plan Into Your Legacy
- Legacy Planning from the Heart™
- Collaborating with Allied Professionals –
    - Moving Charitable Clients from "Charitable Giving 101" to "Charitable Giving 401" While Creating Profitable Engagement for all Members of the Advisory Team
- Principles of Values-Based Legacy Planning
- The Pratt Family Private Discussion – a personal testimony
- Values-Based Practice Management – Building your business and advisory network around your strengths and values
- Insurance Portfolio Management – proactive management of trust-owned life insurance