



LEGACY
TRUST

Pre-Retreat Written Response Questions

Please return your completed responses to lcmarketing@legacytrust.com by **May 4, 2026**.

1. Why do leading families choose us over other wealth managers or trust institutions?

2. What don't we do for families in 2036 that we do today?



3. Who/what will be the most formidable competitor in the future?

4. What is the hardest strategic “no” we must say in the next 24 months to “win” the next 10 years? (client profile, asset minimums, services offered, growth pace, geography)



5. What vulnerability concerns you most over the next decade?

6. If we look back in 2036 and realize we did not win the decade, what will we likely say we should have done differently?