



BIOGRAPHICAL OVERVIEW

## TODD FITHIAN



Todd Fithian has over two decades of experience in 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 as an advisor, but to work to improve it as well. A lifelong entrepreneur, Todd formed his own wealth advisory firm in Boston soon after graduating from college. In 1996 he joined forces with his late brother Scott as Co-Founder of their next venture, The Legacy Companies, an industry leading training and coaching organization focused on advisor growth.

In 2006 he was faced with the loss his brother and mentor following more than a year-long battle with Pancreatic Cancer. Left at the helm of their advisory business and a rapidly growing training organization, he decided to pursue his passion for evolving the financial services industry and sold the advisory business.

Today, as the Managing Partner of Legacy, Todd provides the VISION and LEADERSHIP for his team. Under his direction, Legacy has revolutionized how advisors engage and serve client relationships using Legacy's trademarked approach that allows advisors to discover WHAT matters most to clients and WHY it's important, before jumping into HOW to solve it. Fithian calls these Above the Horizon Conversations and has trained and coached thousands of financial advisors across the United States and Canada in deploying these approaches to drive measurable growth.

In 2007 Fithian Co-Authored his first book *The Right Side of the Table: Where do you sit in the minds of the Affluent* (update ready 8/2020). In 2011 he wrote *The Future of You: Providing Clarity Where Life Intersects Wealth*, in collaboration with 19 members of his Legacy Advisor Growth Network. His work has been published in numerous trade magazines over the years including *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 and private events throughout North America.

Todd and his wife of 24 years Debbie have four children, Andrew (21), Ryan (19), Kelly (16) & Will (11). 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.