Emily Scott &

# Discover the Power of AND

## Your values, vision, AND money

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## Discovery, Insight, Transformation

**Having honest conversations about money and legacy planning is hard, but it doesn't have to be. Emily brings trust and humanity to every conversation and a unique dynamic approach to financial matters. A TEDx presenter, Emily's talks, workshops, and seminars are inspirational, revealing, and practical, with something for every audience.**

## Topics Include:

**Unearth Your Money Story.** The importance of identifying your money story and how that narrative affects spending decisions, communications, relationships, and life transitions. The goal is to help reframe money attitudes and perceptions to achieve financial peace of mind and clarity.

**How to Keep Your Clients.** Having been the financial professional, the client, the donor, and to some merely the "wife," I have a unique set of experiences to share. Includes client case studies illustrating the best and worst of client relations practices.

**Broaden Your Mindset and Creativity.** Like the power of deep listening, sharing different perspectives goes a long way in broadening a person's mindset. With real-life examples, I illustrate how taking in various views can leave people open to new ideas and spur creativity.

**Women, Money, and Unseen Influences.** In this presentation/workshop, I identify the effects of internal and external influences, from childhood to adulthood, on women and their money. We explore how to reframe these unseen influences and use them to our advantage.

**The Power of Vulnerability.** There is much to gain from embracing emotions and feelings and using that information to improve your decisions and communications. The reframe turns vulnerability into a strength and moves you into a more authentic and transparent life.

**Why Energy/Passion Precedes Setting Goals.** Explore the difference between what energizes a person and what passions a person has. We further inspect why considering energy and enthusiasm leads to identifying your values before your goals, bringing exponential satisfaction in all that you do.

**Deep Listening in Every Conversation.** With deep listening as the core of every discussion, conversations move beyond the rote exchange of information. What is deep listening, why it is essential, and how to practice it personally and professionally.

**Live Your Legacy.** A legacy is more than a distribution of assets, and the struggle faced in legacy planning can inhibit the process. Uncover your views on death and dying and explore how this can change how you live your life.

**Enhance Your Philanthropic Fulfillment.** A guide in creating a personal philanthropic Venn diagram that aligns time/treasure/talent, knowledge, values, and passions. Includes a review of issues around donating, volunteering, and board service.

*"Emily Scott is an elegant speaker with a true command of her craft. The feedback on her presentation was overwhelmingly positive. She is an excellent communicator and facilitator AND I highly recommend her for workshops that seek to transform one's own experience and understanding of money, legacy and generosity."*

**Michael Crvarich,** VP, Legacy & Principal Gifts, John Muir Health Foundation

*"Emily is a dynamic speaker who delivers her message with passion, energy and humor. With her words and command of the stage, she paints a picture for the listener and not only engages their minds, but also touches their heart. She is authentic, charismatic and captivating – everything you want in a keynote speaker!"*

**Torie Sandvig**, Vice President, Event and Production Services

## Who Emily has spoken for and/or with:

- TEDx
- Barrons Top Women Advisors Conference
- Financial Transitionist Institute
- AiP National Conference
- Provisors Think Tank Presenter
- NCGCP Regional Conference
- WPO San Francisco Chapter
- John Muir Health Foundation
- San Francisco State Guardian Scholars
- TAG Network for Small Business
- Josh Patrick Sustainable Business Podcast
- Arielle Nobile of Legacy Connections Films
- Simmons College
- Numerous Radio Shows

## About Emily:

Emily started Emily Scott AND to fill the void of merging the technical side of money with the human side of money, especially during transition. She is honored by the trust her clients place in her and describes her role as a financial navigator and confidential thought partner for her clients in the issues and challenges of legacy planning, financial prioritization, and philanthropic choices. She collaborates with other professionals to align core competencies for a robust client offering.

Emily has been a contributor to articles and online media on women in transition, the inner struggles of women and their wealth, how wealthy couples navigate their differences, and philanthropic perspectives. She has received accolades for her authenticity and vulnerability in her presentations at conference, seminars, and podcasts.

Ms. Scott is a certified Financial Transition Professional and on the Advisory Committee of the Financial Transition Institute. She is a member of ProVisors, BAWOM (Bay Area Women's Affinity Group, SF Estate and Succession Planning Advisory Group, NCPGC (NorCal Planned Giving Council), and PPI (Purposeful Planning Institute). Emily holds an MBA from Cornell University, a BA in management from Simmons College, and is an alumna of The Sudden Money Institute and The Philanthropy Workshop.

*"Emily presents research so that it is accessible, enlightening and powerful. Her approach is a wonderful blend of personal transparency, financial acumen, and keen listening skills. Her unique perspective and personal stories create an environment in which the members were comfortable and secure in sharing and learning from their own stories. I recommend her workshop to others who might benefit from greater clarity and peace of mind around money and their financial decisions."*

**Juli Betwee,** Managing Partner,
Pivot Point Partner

*"Emily Scott is a powerful and engaging speaker. Through a mixture of humility and storytelling, tied to salient details and facts, Emily is able to draw in an audience and leave them feeling empowered, ready for action. I wish that I had the innate capacity to connect with my college students and transfer knowledge to them in the seemingly effortless way that Emily does."*

**Daniel Heimpel,** Founder and Executive Director,
Fostering Media Connections

## For more information on Emily and ES&, please:

**Visit the website:**
www.emilyscottand.com

**See Emily's TEDx talk:**
https://emilyscottand.com/ted-talk

**See Emily in action:**
https://emilyscottand.com/speaking

**Hear Emily in action:**
https://emilyscottand.com/speaking

**Read Emily's blogs:**
https://emilyscottand.com/emily-scott-blog-a

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