

Lori M. Coonen, HDP™



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Working with families, individuals, and professionals worldwide for over twenty-five years, Lori's experience ranges from wealth transfer, financial, estate, and legacy planning, to coaching generations in preparation for effective family succession planning. Lori creates collaborative partnerships with other professional advisors, firms and organizations and is brought in as the expert to provide heritage design services to their client/donor families seeking solutions to create multi-generational family harmony.

As Chief Learning Office of The Heritage Institute, Lori co-created and oversees the Heritage Design Professional® certification curriculum and advanced coaching program. To stay actively involved, Lori will also coach candidates and join in as lead instructor for training sessions.

Lori is the author of several white papers on the topic of successful multi-generational planning and the co-author of the book, *unPrepared: Heirs at Risk – 14 Elements of Successful Wealth Transfer*.

She is a lifelong learner and continues to enhance her skills to better serve her clients, families, and her collaborative partnerships. Early in her career, Lori received her CFP™ from the College of Financial Planning, Denver, CO, is a Certified Facilitator for Stratton's Interpersonal Leadership Styles Survey (ILS), completed the Facilitating Effective Communication & Dynamics Program, and most recently completed the Introduction of Bowen Theory from the Bowen Center.

In her free time, Lori enjoys playing sports, reading, watching her favorite NFL team – the Green Bay Packers, driving and riding Harley Davidson motorcycles with her husband, Roland, and going on family vacations with their daughter, Miranda, and “bonus son,” Logan.