Living your Legacy

A podcast series by UBS Family Advisory and Philanthropy Services

We believe a legacy is built over a lifetime; it's defined by how we spend our time and who we spend it with. The **UBS Family Advisory and Philanthropy Services** podcast series, Living your Legacy, aims to educate and inspire clients around family advisory and philanthropy topics by featuring engaging conversations with individuals, families and institutions who are "living their legacies" with intention.

To stay up to date with our latest episodes, subscribe to our **UBS On-Air: Conversations** channel on Apple Podcasts and/or Spotify.

Available Podcasts

Living your Legacy: John Inserra

This episode features a discussion between Liam McCormick, Senior Strategist on the Family Advisory and Philanthropy Services team, and John Inserra, Founder of For Our Shared Humanity. John walked 1,700 miles over 120 days down the spine of the USA on a trek which he called “Walking the Middle”. This walk was the first step in John’s journey to living his legacy through For Our Shared Humanity, a non-profit organization created to shape and share an educational, cross generational voice focused on strengthening the indivisibility rooted in the common ground upon which we all walk.

Available on: Apple Podcasts, Spotify and UBS On-Air.

Living your Legacy: Joe Blackstone

This episode features a discussion between Shawna Hamilton, Senior Strategist on the Family Advisory and Philanthropy Services team, and Joe Blackstone about how his philanthropic journey began and continues in parallel with his entrepreneurial journey. In 1991, Joe founded Blackstone Consulting Inc. (BCI), which he has grown into an international service provider supporting nearly 6,000 employees. Then in 2011, he founded the J3 Foundation in partnership with his wife, Jamie Mohn. Their foundation serves children and youth in the Los Angeles County schools with literacy support. Together they have set out on a mission to provide what they believe every child should have access and support to remain on track in school.

Available on: Apple Podcasts, Spotify and UBS On-Air.

Living your Legacy: Andrea Jung

This episode features a discussion between Julie Binder, Senior Strategist on the Family Advisory and Philanthropy Services team, and Andrea Jung, President and CEO of Grameen America. Andrea is the longest-serving female chief executive in the Fortune 500, a trailblazer for women, and long-term champion of women’s issues. She will share her passion for the work Grameen America does and the immense impact they have had. Founded in 2008, Grameen America builds on the legacy and proven model of Nobel Peace Prize Laureate Muhammad Yunus. Grameen America is a microfinance institution dedicated to helping women who live in poverty build small businesses to create better lives for their families.

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Living your Legacy: Tom Davidson

This episode features a discussion between Tom Naratil, Co-President UBS Global Wealth Management and President UBS Americas, and Tom Davidson, CEO and Founder of EVERFI, about the importance of financial education and creating financial literacy for all. Tom founded EVERFI, a digital financial education company, with the mission of empowering individuals with the tools and skills to drive ecosystems of change and inspire lifelong success. He will share how he began living his legacy through EVERFI and achieved significant impact through the organization.

Available on: Apple Podcasts, Spotify and UBS On-Air.

Living your Legacy: Dale and Katy Carlsen

This episode features a discussion between Shawna Hamilton, Senior Strategist on the Family Advisory and Philanthropy Services team, and Dale Carlsen, Founder and CEO Emeritus of Ticket to Dream, and Dr. Katy Carlsen, Ticket to Dream Board Member. Ticket to Dream is a nonprofit organization dedicated to providing hope and opportunity for foster children across the country. Together, Dale and Katy are living an incredible legacy through their shared philanthropic passion for foster youth.

Available on: Apple Podcasts, Spotify and UBS On-Air.

Living your Legacy: Danielle M. Reyes

This episode features a discussion between Elizabeth Cribbs, Senior Strategist on the Family Advisory and Philanthropy Services team, and Danielle M. Reyes, President and CEO of the Crimsonbridge Foundation. The Crimsonbridge Foundation, founded by Gabriela Smith, is dedicated to investing in transformative and scalable solutions with a focus on education, leadership and capacity building. Crimsonbridge takes a strategic and entrepreneurial approach to philanthropy to create social change. Danielle has over 25 years of experience in leading and designing innovative philanthropic programs and partnerships. She provides insights on when the right time is to hire a professional to partner for your family's philanthropy, and how to think through living and leaving your legacy.

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Living your Legacy: Jean Trebek

This episode features a discussion between Sarah Salomon, Head of UBS Family Advisory and Philanthropy Services, and Jean Trebek, CEO of Inside Wink, an altruistic lifestyle website. Jean's philanthropic endeavors, such as being on the Helen Keller International Board of Trustees, gave her a renewed sense of purpose. She was driven by her passion to assist people in recognizing the innate goodness and generosity in life to create Inside Wink with her partner Alison Martin. Jean shares what she has experienced on her philanthropic journey such as finding inspiration, seeing the benefits of a family foundation and the impact of involving her children in their family's philanthropy.

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Living your Legacy: Pete Kadens

This episode features a discussion between Sarah Salomon, Head of UBS Family Advisory and Philanthropy Services, and Pete Kadens, serial entrepreneur and philanthropist. Pete was Co-Founder of Green Thumb Industries and served as CEO until his retirement in 2018. In his early retirement, Pete sought a renewed sense of purpose and found it in philanthropy. He is now Chairman of the Kadens Family Foundation and Hope Chicago, both nonprofit organizations focused on creating pathways out of poverty through education. Pete shares how he arrived at this point in his journey and what he has learned along the way, such as the importance of family philanthropy and having a well-defined mission statement.

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Living your Legacy: Levitt Foundation

This episode features a discussion between Elizabeth Cribbs, Senior Strategist on the Family Advisory and Philanthropy Services team, and two members of the Levitt Foundation, Liz Levitt Hirsch, Board President, and Sharon Yazowski, Founding Executive Director. The Levitt Foundation is a remarkable example of a mid-sized, private family foundation that is making a big impact in communities. Through its commitment to creative placemaking, its grantmaking and research, the Levitt Foundation partners with nonprofits across the country to activate underused public spaces to create joyous, inclusive community destinations. Liz and Sharon share practical advice on how to transition a family foundation between generations, partner with local nonprofits to better serve their communities and strategically approach sunsetting a private foundation.

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Living your Legacy: Bob Roth

This episode features a discussion between Sabrina Parks, Business Associate on the Family Advisory and Philanthropy Services team, and Bob Roth, CEO of the David Lynch Foundation. The David Lynch Foundation helps to prevent and eradicate the epidemic of trauma and toxic stress among at-risk populations through promoting widespread implementation of the evidence-based Transcendental Meditation (TM) ® program. Bob has found passion and purpose in bringing TM to underserved inner-city students, veterans and survivors of abuse with the goal of improving their health and cognitive abilities. He shares how the foundation has approached scale and evolved their strategy over time to achieve global impact.

Available on: Apple Podcasts, Spotify and UBS On-Air.

Living your Legacy: Force Blue

This episode features a discussion between Liam McCormick, Senior Strategist on the UBS Family Advisory and Philanthropy Services team, in conversation with Jim Ritterhoff, Co-Founder of Force Blue, and Roger Sparks, Special Operations Veteran and Force Blue Diver. Force Blue seeks to address two seemingly unrelated problems — the rapidly declining health of our planet's marine resources and the difficulty returning combat veterans have in adjusting to civilian life — through one, mission-focused program. Jim and Roger share the importance of intentionality and having a focused mission statement as Force Blue pursues their mission to unite the community of Special Operations veterans with the world of marine conservation for the betterment of both lives and restoration of the planet.

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Living your Legacy: Re:wild

This episode features a discussion between Shawna Hamilton, Senior Strategist on the UBS Family Advisory and Philanthropy Services team, in conversation with Dr. Barney Long, Senior Director of Conservation Strategies at Re:wild. Re:wild's mission is to protect and restore the wild to build a thriving Earth where all life flourishes. Barney shares how Re:wild combines more than three decades of conservation impact by Leonardo DiCaprio and Global Wildlife Conservation, expertise, partnerships and platforms to bring new attention, energy and voices together. He emphasizes the importance and power of partnerships to expand and amplify their mission.

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