As your advocates, we're dedicated

to placing a ribbon around your ever-changing financial needs and empo

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Our Services

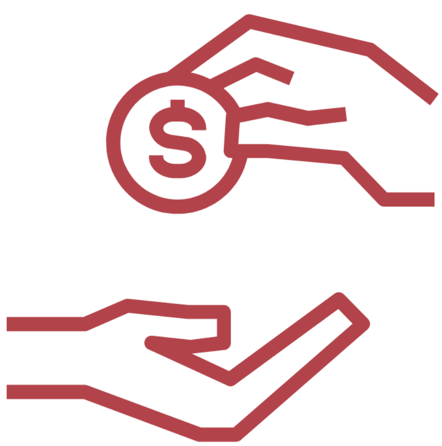
We are full-service retirement services firm, finding real-world solutions to the concerns facing the retirees of today and tomorrow.

(/services/)

Wealth Management (/services/)

(/services/#legacy-planning)

Legacy Planning (/services/#legacy-planning)



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Social Security Maximization (/services/#social-security-maximization)

(/services/#medicare-planning)

Medicare Planning (/services/#medicare-planning)

What makes Unified Legacy Advisors different?

Full-service retirement planning under one roof

We have a wide variety of tools & services tailored just for you. Because we focus squarely on the wants and needs of those seriously planning for and/or currently in retirement, we simplify what can be a confusing process.

Ongoing service and support

We are not, and never will be, a “transaction-based” firm. Instead, our commitment to you is to always provide ongoing service, support, and guidance.

A referral-based firm

A majority of our clients come to us as referrals from existing satisfied clients. Unlike traditional financial advisors who spend too much time looking for new clients, our time is much better spent providing exemplary service.

Our Mission & Focus

Unified Legacy Advisors understands the importance of **Today's Life, Tomorrow's Legacy**. As your advocates, we are dedicated to placing a ribbon around your ever-changing financial needs – now and in the future. Through proper planning, our grand purpose is to enable you to protect and grow what you've worked a lifetime to build.

Unified Legacy Advisors focus on the wants and needs of those near and in retirement. The primary financial concern of our clients is the preservation and distribution of their assets. They also want to achieve the best possible earnings on those assets, without jeopardizing safety and security.

Retirement Resources

Navigating the waters of retirement doesn't have to be challenge. Unified Legacy Advisors' resources can educate you of common challenges that many people face.

5 Big Threats to Your Retirement

Download

6 Common Retirement Planning Mistakes

Download

Document Checklist

Download

Contact Us

Phone: (402) 261-7089

Fax: (402) 387-7254

Unified Legacy Advisors

9240 Andermatt Drive, Ste. 2

Lincoln, NE 68526

or

14301 FNB Parkway

Suite 100

Omaha, NE 68154

Quick Links

Our Mission

Our approach goes to the heart of who we are and the potential our actions can have in the lives of our clients and their loved ones. We each strive to serve as client advocates – enabling each individual to succeed with their financial goals.

Important Disclosures