



UNIFIED LEGACY ADVISORS

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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.



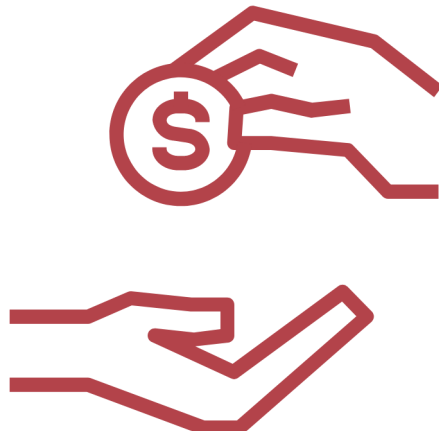
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Medicare Planning (/services/#medicare-planning)

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

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Quick Links

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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

Wealth management services are offered through Patriot Financial Group, an SEC registered investment adviser, dba Unified Legacy Advisors. Insurance products and services are offered through Unified Retirement Specialists, LLC and Unified Legacy Advisors. Wealth management and insurance products and services are only available where representatives are appropriately licensed and registered. Contact your representative for more information about your individual situation. This website is for informational purposes only and is not an offer to buy or sell any product or service offered by the firm. This document should not be construed as providing tax or legal advice. Always consult with your own qualified tax, legal and/or accounting advisors as appropriate. Insurance products are offered through Unified Legacy Advisors. Insurance and annuity guarantees are backed by the financial strength and claims-paying ability of the issuing insurance company and are not FDIC-insured. This site is published for residents of the United States and is for informational purposes only and does not constitute an offer to sell or a solicitation of an offer to buy any security or product that may be referenced herein. Persons mentioned on this website may only offer services and transact business and/or respond to inquiries in states or jurisdictions in which they have been properly registered or are exempt from registration. Not all products and services referenced on this site are available in every state, jurisdiction or from every person listed. Estate Planning offered through a Unified Legacy Advisors law affiliate.

