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LEGACY
FINANCIAL ★ MANAGEMENT

(806) 771-1977

Welcome to Legacy Financial Management

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We appreciate you checking out our website. Our goal throughout this site is to introduce you as to who we are and how we serve our clients. We want to give clients access to information concerning their accounts and to also keep them up to date with any information and/or coming events. For prospective clients, we want this to be our "introduction" to you and hopefully contact us to go from being a prospective client to a new client.

Today's financial environment presents many challenges for people looking to grow and maintain financial assets they have worked so hard to accumulate. Whether your financial goals are:

- Preparing for retirement

- If in retirement, wondering how your money is going to last through your retirement and you don't outlive your money.

- Having enough assets to provide you an income so that you can start a new career

- Providing for a child's or grandchild's college education.

the need for competent and objective financial guidance has never been greater.

Legacy Financial Management was formed to give people a resource to provide and consult with them in an ever changing financial world. As an independent financial consulting firm our objective is to provide you competent financial advice and be passionate about providing you with sound solutions. It is our experience that people today are looking for financial advisors that are more interested in doing what's best for them, rather that what's best for the advisor or their firm. Our firm's mission is to take the time to get to know your particular needs and to provide rational solutions that will be best for you. We do this by helping you establish your goals, gather pertinent financial data, analyze the data, recommend solutions, and help implement and monitor the solutions.

As primarily a fee based firm, we have no other agenda than to align your needs with the right financial strategy using a variety of investment products without the influence of sales commissions. You get ongoing oversight of your financial strategy and as your needs and goals change, so do your investments. We follow a disciplined approach to balance risk and return and believe that educating clients helps them make informed decisions. We don't tell you what to do; we partner with you.

We hope that our firm's philosophy matches what you may be looking for in a financial consulting firm. We look forward to meeting you and learning more about how we might provide investment advisory and financial planning to you.

About Us

Our company is built on a solid foundation of excellent client service and in-depth market knowledge. Click here to learn more about us.

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Free Consultation

Click here to fill out our form today and we will contact you shortly for a no-obligation financial consultation.

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Understanding Today's Financial Environment

We can help take the mystery our of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

Your Financial Future

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

Have a Question?

Name

Email

Phone

Question

SEND

Contact

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