Legacy One
FINANCIAL ADVISORS

Enjoy life's special moments!

Learn how we can help

YOUR FAMILY. YOUR PLAN.

OUR APPROACH…

To apply thoughtfulness, compassion, empathy and expertise for each family, each plan, each discussion.

LEGACY ONE FINANCIAL ADVISORS

Our Story

Our Team

Providing sound investment services and advice to clients has been our mission for more than 20 years.

As a fee-only, SEC registered investment advisor (RIA) we are better able to provide sophisticated, holistic wealth management services, with expanded access to investment solutions and the latest technology offering ready insights into investment performance.

Our long standing objective is to enable you to achieve your financial goals and to provide a customized, place at Legacy One Financial Advisors – we will strive to improve in everything we do.

Your Life – Your Legacy – Our Expertise

WEALTH MANAGEMENT SERVICES

Legacy One offers unique wealth management services to families and individuals looking to take control of their financial future.

Creating and managing wealth is personal, It's about you, your current stage of life, and how to best meet your long-term needs. Whatever your situation, our advisors are well prepared to help you get to and through retirement, and to help you leave a lasting legacy.

We take our fiduciary responsibility to you very seriously, which means we are committed to what is in your best interest. That's also why we chose to be "fee only" advisors. We are transparent about our fees, so you can unique needs. Building an ongoing relationship with you is integral to all that we do. We invite you to meet with us, so we can get to know you and discuss how we can help you accomplish not only your goals, but also your dreams.

Individuals & Families

Businesses

Please contact us today to schedule a meeting. We hope to see you soon!

Each client is unique, and we specialize in tailoring our advice to not only fit your current situation, but also provide a foundation for future growth. No matter where you are in your financial journey, we endeavor to take you to the next level.

Our advisors work closely with you to understand your specific needs and goals in order to craft a plan, and then design an investment strategy to help you achieve it. Of course, we also help with retirement planning, estate planning, risk management (insurance), cash flow/money management, college planning and more.

MEETING GOALS

Individuals and families with different levels of resources and financial asset complexities require different investment solutions. But we all have multiple goals and priorities - and we all have a limit to how much risk we can take.

Our initial objective is to help you identify, quantify and prioritize your most critical goals - the ones you really cannot afford to miss. We want to take care of these goals in a fashion that minimizes the potential for you to get knocked off track by episodes of extreme market risk and helps avoid the emotional reactions that often follow. For some people, depending on their financial resources and goals, this may represent their entire portfolio.

For other clients, there may be excess capital available to deploy after the priority goals are funded. Custom portfolio solutions are introduced and sequenced for these clients as appropriate.

Whether you need to keep earning to meet long-term goals, or you ‘have enough’ and want to be more opportunistic in your investment approach, selecting a trusted partner for investment advice is an important decision. Our team has the expertise to help you navigate the challenging investment environment. We are committed to providing the right resources, cost-effectively, so you can achieve your objectives.

Please contact us today to schedule a meeting. We hope to see you soon!

MEET WITH US

Whether it's the first time you are looking for a financial advisor or you want a second opinion on what you are already doing, please give us a call.

It could be the start of a wonderful relationship!

LEGACY ONE FINANCIAL ADVISORS

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Legacy One Financial Advisors is an independent, SEC registered investment advisor with offices in Austin and Georgetown, Texas. At Legacy One, our motto is "your family, your plan." Whether you are just starting out or already appreciate the need to carefully manage your financial life, we can help you achieve your goals. Our approach is to apply thoughtfulness, compassion, empathy and expertise for each family, each plan, each discussion.

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Advisory services offered through Legacy One Financial Advisors.

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