LEGACY ASSET MANAGEMENT, INC.

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WELCOME TO LEGACY ASSET MANAGEMENT

Since 1998, Legacy has helped our clients build & protect their financial future through investment management solutions, financial planning & 401K retirement plan consulting.

Can We Help You?

Spotlight

- The Era of Trump Trade Policy and Brexit Pushes Advisors to Answer Tough Questions - April 5, 2019
- An interview with Jillian Nel "Why I Became a CFP Professional" - March 6, 2019
- Legacy is the Wine Pull Sponsor for Iron Sommelier Benefitting The Periwinkle Foundation - November, 2018
- Legacy Sponsored the AVDA Home Safe Home Gala - October, 2018
- Jillian Nel is interviewed by Voyage Houston Magazine - August, 2018
- Houston Business Journal ranks Legacy Asset Management as Number Six of the Top 25 Wealth Management Firms in Houston - July, 2018
- Financial Times names Legacy Asset Management as one of the Top 300 US Registered Investment Advisers of 2018 - June, 2018
- Jillian Nel on ABC 13 News - April 5, 2018
- Jillian Nel on ABC 13 News - April 4, 2018
- Rick Kaplan on KHOU 11 News - February 6, 2018
- Jillian is quoted on Investopedia - Roth 401(K), 403(b): Which is Right for You? - February 2, 2018
- Jillian is quoted on Investopedia - 11 Things You May Not Know About Your IRA - December 15, 2017

- Jillian is quoted on Investopedia - Avoiding Mistakes In Required Minimum Distributions (RMD) - December 8, 2017
- Jillian was quoted on Investopedia - Top 6 Myths About Social Security Benefits - December 6, 2017
- Jillian Nel on the cover of the October issue of Retirement Advisor Magazine

- 4 Tips on How to Live a Fulfilling but Frugal Life Throughout Retirement
- Rick Kaplan interviewed by ABC 13's Tom Abrahams on the NYSE temporary Shutdown - July 9, 2015 - NYSE Shutdown

- Upends an Already Tough Day for Markets
- Jillian Nel on the cover of the March issue of *Retirement Advisor Magazine*

- "The Big Picture on Dual Licenses" by David Port
- Joe Birkofer named Top 401 Retirement Advisor 2015 by the *Financial Times*

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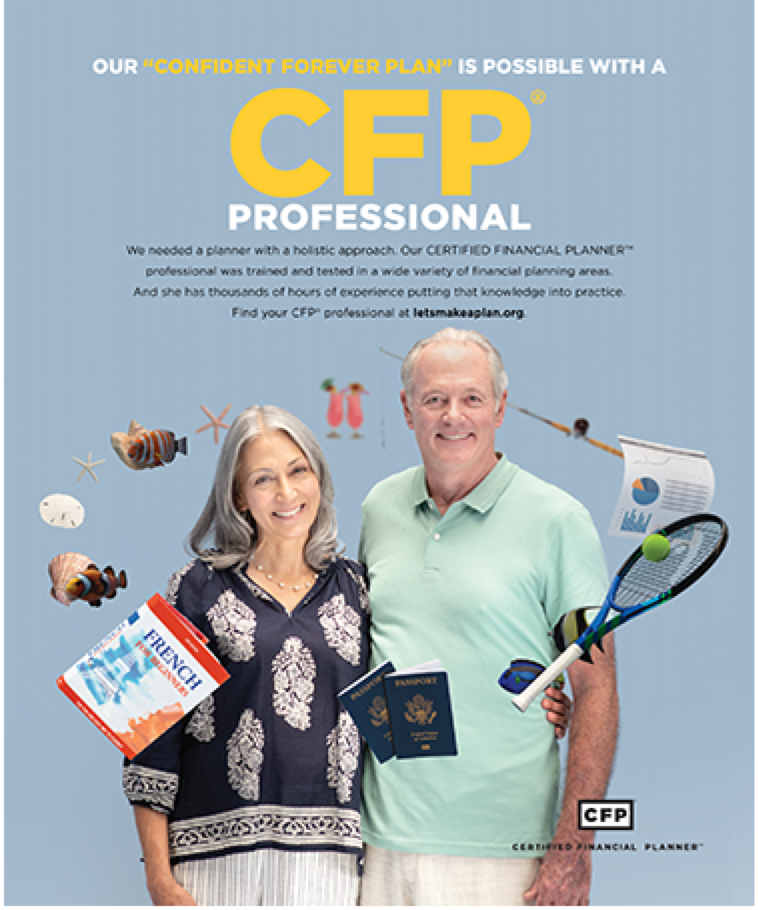

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