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THE LEGACY FINANCIAL GROUP

WHO WE ARE

(/about)

WHAT WE DO

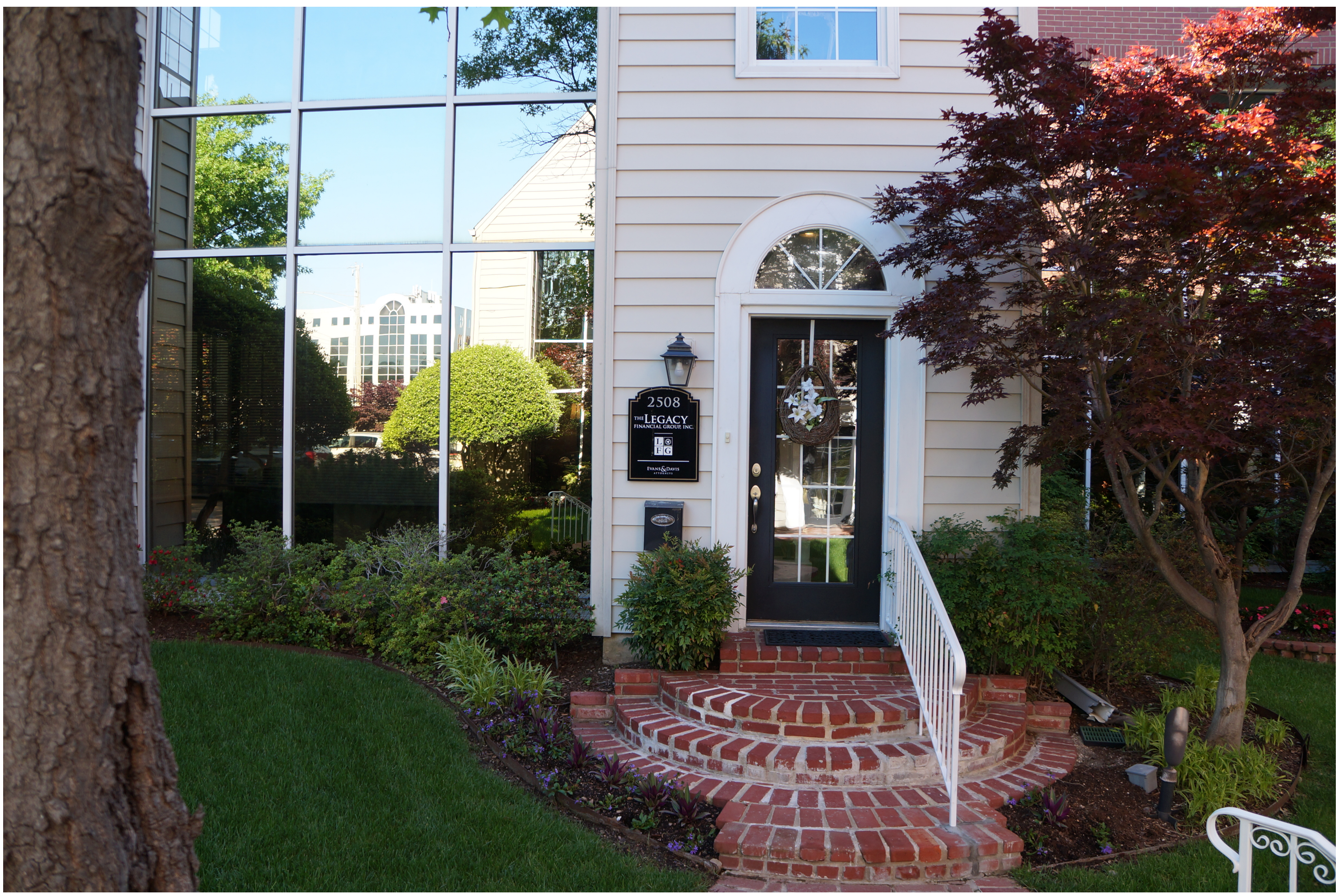
(/services)

CLIENT LOGIN

(/client-center)

CONTACT US

(/contact)



We are **The Legacy Financial Group**

Legacy is an independent registered investment advisor that provides prudent investment advisory services to individuals, 401k plans, trusts, foundations, and businesses.

We believe financial markets are efficient, risk and return are related, and diversification and discipline are the keys to a successful investment experience.

Legacy was founded to provide a successful investment experience to empower you to reach your goals. A successful investment experience results from owning a broadly diversified global portfolio. It is inherently designed to weather market downturns and to capture the growth generated by market upturns.

Our relationships are established upon trust and integrity. We will place your best interest first.

(http://www.facebook.com/TheLegacyFinancialGroup) (http://www.linkedin.com/company/the-legacy-financial-group-inc)

PROCESS

Step 1: Consultation

The key to the successful long term relationship we have with nearly every client is starting off with the right fit. That is why before we bring on a new client we go through an exhaustive information gathering process. Only with a good understating of someone's long term financial goals can we determine if we are best suited to help them succeed. Additionally, we want to effectively demonstrate our expertise, experience and trust to the point that you feel there is no doubt we are the firm that best serves your needs.

Step 2: Recommendation

After assimilating and synthesizing the information gathered in Step 1 we then get to work formulating your financial and investment plan. Once the framework is constructed we present to you the plan outline with specific steps on how to maximize the probability of achieving your life long goals, whether that be retirement planning, education planning, legacy planning, something else, or all of the above.

Step 3:
Implementation

We typically describe implementation as a rocket ship launch. There is often a lot of heavy lifting to get your financial life in order. Investment implementation, savings strategies, tax planning, asset location, and estate planning are just a small sampling of the first steps in getting your plan into action. It may feel like a lot of movement without going anywhere, but once we get you off the ground it will seem like things are traveling at lighting speed towards your financial destination.

Step 4:
Ongoing Follow-up

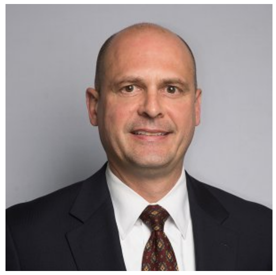
There is no such thing as a one-time financial plan or a “set it and forget it” investment strategy. Your life is complicated and things are constantly changing. That is why we meet often (at least annually) to continually fine tune and tweak your plan. There is undoubtedly a to-do-list that we will continue to dwindle down over time as we move you closer to the culmination of your investment goals. Ultimately we strive to see every client take their most important goals to fruition.

TEAM | OUR TEAM OF PROFESSIONALS.

KEVIN KING

Principal

Bio



RANDY CLOUD

Principal

Bio

JEFF MAXWELL

Principal

Bio

ERIC BURKHOLDER

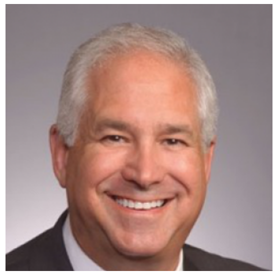
Senior Advisor

Bio

DOUG SCOTT

Senior Advisor

Bio



MARK MORLEY

Senior Advisor

Bio

BRAY KILLINGSWORTH

Senior Advisor

Bio

ELISSA JOHNSON

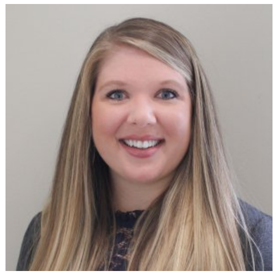
Director of Operations

Bio

MATT HENRY

Financial Analyst

Bio



REAGAN POOL

Client Service Administrator

Bio

BLOG | LATEST POSTS.

Latest Blog Posts

Tax Alert: Beware of “double taxation” on employee stock options (/blog/tax-alert-beware-double-taxation-employee-stock-options)

Apr 18, 2019 by The Legacy Financial Group

While Tax Day has passed, the time to pay close attention to your tax return never does. You can always file an amendment and if you filed an extension you have until October 31st to make any changes.

We want to bring to your attention a particular issue we have seen occurring more frequently. It relates to employee stock options and how custodians report cost basis which can lead to double counting gains (taxed as ordinary income).

> New...

Read More (/blog/tax-alert-beware-double-taxation-employee-stock-options)

Investment Myth Busting (/blog/investment-myth-busting)

Oct 29, 2018 by The Legacy Financial Group

Benjamin Graham, the father of value investing and mentor to Warren Buffett, liked to refer to “Mr. Market” as having bipolar disorder. The stock market tends to behave much more like a human being than a financial instrument. The market can be euphoric one moment and despondent the next. John Keynes, the famous economist, described the market as often being driven by “animal spirits” which could frequently seem irrational.

Unfortunately for investors, when...

Read More (/blog/investment-myth-busting)

2018 Tax Cuts and Jobs Act Highlights (/blog/2018-tax-cuts-and-jobs-act-highlights)

Feb 23, 2018 by The Legacy Financial Group

The Tax Cuts and jobs Act is the most sweeping tax reform measure in over 30 years. The new legislation makes fundamental changes to the Internal Revenue Code that will upend the way all taxpayers (individuals, businesses, foreign taxpayers) calculate their federal income tax liability.

The changes affecting individuals include new tax rates and brackets, and increased standard deduction, elimination of personal exemptions, new limits on itemized deductions (state taxes, mortgage...

Read More (/blog/2018-tax-cuts-and-jobs-act-highlights)

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95.9227489?
ion=1&espv=2&q=11122+S.+Yale+Ave,+Suite+B,+Tulsa+OK+74137&bav=on.2,or.r_cp.&biw=1647&bih=820&dpr=1&um=1&ie=UTF-8&sa=X&ved=0ahUKEwic4r_2hq_TAhVX7mMKHS1jBrgQ_AUIBigB)

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