

You are *unique* —

Make sure your retirement plan is too.

As seen on

THE
WALL STREET
JOURNAL.



THE
DENVER
POST



Wealth Legacy Institute is a nationally recognized fee-only financial planning and independent wealth management firm committed to helping you live the life you imagine and leave the legacy you envision. We believe that long-term, collaborative, fiduciary relationships are key to your ultimate success. Our mission is to inspire and nurture the human spirit through unbiased advice that supports a healthy, fulfilling life — one person and one family at a time. Let's start with **you.**

I have the utmost faith and confidence in Wealth Legacy and the crew I deal with on a regular basis. We are with them for the long haul. Love them all!

Lynne B.



Our Trusted Partners





Financial DIA



Americans for Financial Reform



Work with a fiduciary to ensure you're getting the best advice.

Our Process

Discover

Uncover your values, attitudes, goals, and aspirations that will begin to shape your master life-plan.

Design

Together, we'll create tailored strategies, tactics and tools to match your objectives.

Make Good

Set your plan in motion to achieve three possible goals: accumulation of wealth, security and independence, or a personal legacy.

Grow

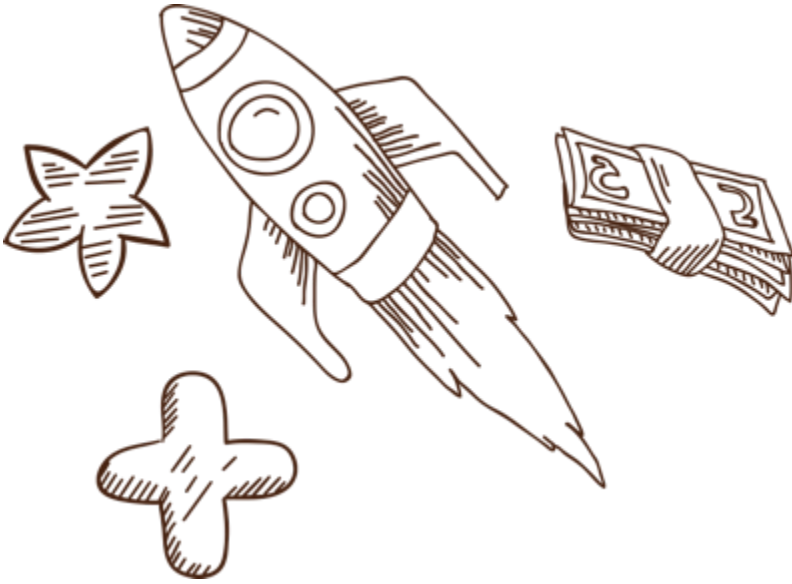
Measure and evaluate performance against industry benchmarks and your unique goals – in person, or via video chat or phone each quarter.

Solutions



Planning for LIFE Experience™

Work with us to design a financial plan that works for your lifetime and beyond—built together, based on your values.



Intelligent Investing™

Execute on a research-driven and goal-based strategy that ensures your portfolio's long-term success in any market.

Master your money

The first step to living the retirement lifestyle you dream of is planning. While many people know what they should do, their behavior doesn't always align. Our guide offers you a blueprint: small, simple adjustments, that can make the difference between retiring comfortably or dying broke.

This Money Secrets ebook will help you:

Put money into its proper place

Save years of time by avoiding pitfalls

Learn the essential shortcuts to develop financial clarity and confidence

Play to win

Download this FREE guide and learn how to transform your financial life and enjoy the freedom and success you deserve.

Download the free Money Secrets eBook!

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