Legacy Financial Advisors is a comprehensive wealth-management firm specializing in retirement planning, legacy planning and navigating life transitions. With over 30 years of experience, we pride ourselves on providing knowledgeable, compassionate service, and on developing investment solutions that meet the unique financial goals of our clients.

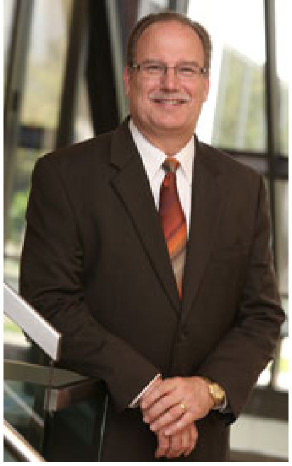
FIVE STAR Wealth Manager

FIVE STAR WEALTH MANAGER
Thomas Menzel
President
2015 • 2016 • 2017 • 2018

FIVE STAR Wealth Managers are selected as a result of an eligibility and evaluation process. See below for full disclosure of the selection process and qualifications.

Recent Commentary

- Market Commentary 3/31/2019
- Market Commentary 12/31/2018
- Market Commentary 09/30/2018
- Market Commentary 06/30/2018
- Market Commentary 03/31/2018



Tom Menzel, CFP®

With a commitment to **understanding life’s transitions and serving you with compassion,** Legacy Financial Advisors is dedicated to helping successful individuals and families preserve and enhance their wealth.

Legacy Financial Advisors knows that making major financial decisions can be difficult. Whether planning for retirement, building a lasting legacy for your loved ones, or navigating a life transition, the right choices are not always clear. Regardless of your personal or financial situation, we are here to help you. We will work with you to assess your specific needs, clarify your options, and develop solutions that meet your unique financial objectives.

In business for more than **35** years, we have the experience and ability necessary to coordinate with other professionals helping you work toward your financial goals, assuring you that your needs are met with comprehensive expertise.

Built on a reputation of diligence and integrity, Legacy Financial Advisors will work tirelessly for your peace of mind.

FIVE STAR Wealth Managers are nominated by their industry peers. They are asked to identify one or more wealth managers they know to have an established practice, good client relationships and a strong reputation. Award winners must satisfy various criteria including being actively employed as an industry professional for a minimum of 5 years, having maintained a favorable regulatory history, and accepting new clients. Additional review considerations include client retention rate, assets under management, the number of client households and industry credentials. Professionals do not pay a fee to be considered or placed on the final award list. The FIVE STAR award is not indicative of a wealth manager’s future performance.

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