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(215) 702-9757

Comprehensive Financial Planning

We understand that individuals face unique challenges as they prepare for retirement. We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

Who We Are

Bryan J. Connolly, CFP®

Founder / Senior Financial Planner

In 1986, with rumors of U.S. Steel closing operations at its Fairless Works facility, Bryan decided it was time for a career change. Long having an interest in investing and facing employment changes of his own, he realized that he had the opportunity to turn his interest into a profession. With guidance from a friend, Bryan became licensed with Waddell & Reed in Langhorne, PA. When Fairless Works closed the hot side of the plant in January of 1991, Bryan began working full time as a financial advisor. After obtaining his CERTIFIED FINANCIAL PLANNER™ certificate in 1993 and successfully building his client base, Bryan chose to further develop his business by joining a group of independent financial advisors. Since joining Legacy Financial Services Group, Bryan has been better able to serve his clients with increased support and a wide range of products that are available to him as an independent financial advisor.

Having more than thirty years of experience, Bryan strives to help his clients realize, and reach, their financial goals. He is mindful that each client is unique and deserves services tailored to their individual needs. His approach enables him to maintain a client base made up of a diverse group of individuals, families and businesses, many of whom have been with Bryan from the start.

Bryan is a member of the Financial Planning Association - Philadelphia Tri-State Area. He currently holds Series 7 & 63 and offers Investment Advisory services through FSC Securities Corporation.

Bryan, a father of two grown children, lives in Langhorne, PA with his wife, Karen. When the weather warms, he enjoys golfing or spending time on his sailboat. He makes time to ski as often as he can, be it in man made snow or in sub-zero temps. He and Karen especially enjoy spending time with their three granddaughters and taking their beloved dog, Gracie, to the park and beach.

Erin Marie Derrico, CFP®

Associate Financial Planner

September 2018 marked 20 years since Erin joined Bryan's business. She started as his administrative assistant, following his move from Waddell & Reed, and quickly became qualified to assist in the income tax preparation side of the business. While managing daily office operations and client services, Erin obtained the Series 7 & 63 licenses. In 2003, she achieved her CERTIFIED FINANCIAL PLANNER™ certificate, and currently holds her Life insurance license.

While overseeing all aspects of client services, Erin is also a partner in the tax preparation component of Lumen Financial Group. Her attention to detail is an essential part of all client relationships. Erin works side by side with Bryan and Andy in developing and implementing fundamental strategies, as well as the ongoing review process for each of our client's accounts.

Erin is a proud mother of three boys in high school, middle school and preschool. She is also the eldest of five children and part of a large extended family. Not only does she have twenty years' experience in the business, she also has firsthand knowledge of the financial situations individuals and families encounter in a lifetime.

When not in the office, Erin can be found running her boys to and from practice, games, jobs and friends' houses in Central New Jersey. While at home, its up and down flights of stairs carrying laundry baskets or in the kitchen whipping up various new recipes for her family to critique. Doing it all with a smile.

Andrew Connolly, CFP®

Associate Financial Planner

It is with great pleasure we introduce Andrew B Connolly, CERTIFIED FINANCIAL PLANNER™. Andy earned his CFP® certificate at the end of 2018. Andy is a 2002 graduate of Gettysburg College with a Bachelor of Arts degree in Philosophy. In 2009, he received his Masters' degree in Secondary Education from Holy Family University. Prior to joining Bryan and Erin in 2014, Andy was employed by Fisherman's Mark, a small non-profit social services agency in Lambertville, NJ.

In addition to his CFP® certificate, Andy holds the Series 7, 66 and insurance licenses. Using his Life, Health and Long-Term Care insurance licenses, he's responsible for assisting our clients with their insurance needs. In addition to contributing to overall client maintenance and reviews, Andy also spends his time researching products to further assist our clients in achieving their financial goals.

Born and raised in Croydon, PA, Andy now resides in New Britain, PA with his wife, Katelynn, and their family. In contrast to Erin’s brood, they’re raising three beautiful daughters. The girls love judging dad’s new pizza creations, being silly models on the other side of mom’s camera and exploring the trails in any number of parks near their home.

Have a Question?

Name

Email

Phone

Question

SEND

Contact

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