Financial planning is complex. But it doesn’t have to be hard.

Your wealth affords you a life that's full of opportunity.

Don't spend it worrying about your finances.

Whether you want to retire comfortably or fund your grandchild's college education, you've got important financial goals. Legacy Wealth Management can help build and protect your wealth based on your needs so that you have more time to focus on what matters: *enjoying it.*

Helping you achieve your goals is our priority.

Since Legacy is a fiduciary fee-only firm, your financial plans will be unbiased and based purely on your goals (not a commission). That's just one reason 98 percent of Legacy clients *stay* Legacy clients.

Imagine getting financial planning advice from extended family. You'll have the same friendly experience with Legacy.

WORK WITH US

With experience and insight in estate law, tax, insurance, and investments, your management team offers expertise beyond financial planning.

MEET YOUR TEAM

We specialize in helping FedEx Pilots.

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TEAM LEADERSHIP

Meet the whole team »