*(Re)*Inventing

WEALTH MANAGEMENT

We are committed to helping our clients in their desire to achieve peace of mind by serving them with the highest level of integrity, ensuring that their lifetime, philanthropic, business, estate and investment affairs are in order, and helping them create a lasting legacy that embraces their value system, love of family and commitment to their community.

Expertise

EXPERIENCED PROFESSIONALS

Each of our associates is a skilled professional with the experience and education to help our clients sort through a variety of difficult issues. We make certain that every aspect of a plan is implemented and take great pride in our process, which is vital to creating and implementing every customized strategy.

OUR PROCESS

What **We Do**

Our clients have unique and sophisticated planning needs and we deliver comprehensive planning across a broad range of complicated issues. Our forty years of experience working with multi-generational families and their businesses coupled with our resident subject matter experts enables us to take the complex and translate it into a simple plan of action to help you achieve your goals and objectives.

HAVE YOUR FAMILY

Join Our Family

We advise highly successful families on the unique challenges and opportunities created by their success. Our clients work hard to accomplish their personal objectives. Financial goals are an important part of any plan, but these goals stretch beyond financial. Their character and values define their identity. This is what is most important to our clients and the legacy they work hard to instill in their families.

CONTACT US

LEARN MORE

Legacy ADVISORS

WHAT WE DO

Lifetime Planning

Investment Planning

Estate Planning

Continuity Planning

Philanthropic Planning

Retirement Plan Services

FOUNDATION

Making a Difference

Special Thank Yous

Grant Submission

Contact Information

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PRIVACY POLICY

DISCLOSURES