Review of Legacy Wealth Management – A Top-Rated Wealth Manager

Legacy Wealth Management was recently ranked by AdvisoryHQ News as a top-rated wealth management firm in Memphis, TN.

The report below provides a top-down review and comprehensive details on the factors that enabled this firm to be ranked as one of the top wealth managers in Memphis, TN.

Intro: About AdvisoryHQ News

AdvisoryHQ News is a fast-growing global online news media that provides extensive research, reviews, and rankings of firms and products.

Searching for top-rated firms, services, and products can be a daunting undertaking for a consumer, especially if that consumer is unfamiliar with the landscape. AdvisoryHQ is committed to simplifying the research that consumers conduct before choosing a top provider, firm, service , or product.

Our review and ranking articles are always 100% independently researched and written. Firms do not pay for their ranking. In fact, most firms do not even realize that they are being reviewed by AdvisoryHQ until after our reviews have been completed and published to the public.

Overview of Legacy Wealth Management

Legacy Wealth Management combines unparalleled financial planning services along with expertly led portfolio management. In fact, this year marks the impressive 35 years spent offering this completely seamless, comprehensive experience for each client. Located in Memphis, Tennessee, it serves clients in states all over the northern United States.

Legacy Wealth is a fee-only wealth management firm in Memphis.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

What follows is an overview of key factors that allowed Legacy Wealth Management to rank as one of this year's top wealth management firms in Memphis.

Independence on Display

Legacy Wealth proudly serves as an employee-owned, SEC-registered, independent wealth management firm. This wealth management firm in Memphis offers commission-free services on a fee-only basis, meaning you know your costs up front, and there is never a hidden fee or agenda.

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Specialized Services

Legacy Wealth caters custom services to a variety of clients. Financial planning can be a complex matter, especially when you are a business owner or work in a particular field. This wealth management firm in Memphis can provide specialized financial planning for:

- Physicians
- Attorneys
- Widowers/heirs
- Retirees
- FedEx pilots
- Entrepreneurs
- Executives
- Other professionals

Financial Plan

Legacy Wealth works through a multitude of facets to create a comprehensive financial plan for each client. Expert knowledge, combined with practical and effective solutions, allow this Memphis wealth management firm to extend the following services:

- Tax planning
- Estate planning
- Retirement planning
- Insurance planning
- Other planning

Portfolio Management

An appropriately managed investment portfolio contains inner workings which are closely tied to your financial plan. By identifying your investment objectives and creating a clear plan to develop those objectives into tangible success, Legacy Wealth is able to offer:

- Institutional quality investments
- Rigorous investment selection
- Asset allocation strategies
- Tax-efficient portfolio construction
- Monitoring and reporting

Article Link:

http://www.advisoryhq.com/articles/top-financial-advisors-in-nashville-memphis/#Legacy-Wealth-Review

Contact Us

LEGACY WEALTH MANAGEMENT | Right by you.

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Contact us for questions and comments about this review article: www.AdvisoryHQ.com

Advisory HQ Selection Methodology

- Using publicly available sources, Advisory HQ identifies a wide range of products or firms providing services in a designated area (city, state, or local geographic location).
- Advisory HQ's review team then applies initial methodology filters to narrow down the list of identified firms/products. These filters include a firm's fee structure, fiduciary classification, level of independence, transparency, and objectivity.
- After trimming down the initial list, Advisory HQ then conducts a deep-dive assessment of the remaining firms. The award criteria takes into account a range of factors, including experience level, level of customization, site quality, resources, features, range of provided services, innovation, value-added, and many more factors, to build up a broad picture of what each firm or product has to offer, before the final selection process occurs.
- Based on the results of Advisory HQ's assessment, our research and selection team then finalizes the list of entities that make it into its top rated publications, which are then published to the general public.