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

Overview: Legacy Wealth Management

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

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.

For additional information on AdvisoryHQ's methodologies, click here: AdvisoryHQ Methodologies. For information on AdvisoryHQ's objectivity approach, click here: AdvisoryHQ's Objective Process.

Overview of Legacy Wealth Management

Guided by a mission to always put their clients first, Legacy Wealth Management is a top-rated Memphis financial advisory firm that's been serving clients since 1982. They serve a wide range of clients throughout the country and have a specialty in working with FedEx pilots.

The firm is a fee-only, fiduciary wealth manager in Memphis who helps to simplify the complex world of investments and financial planning for their clients so they can just enjoy their lives.

Key Factors That Enabled Legacy Wealth to Rank as a Top Financial Advisor in Memphis

Comprehensive Financial Planning

For many clients, the best financial advisors in Memphis are firms that offer a broad and diverse range of services.

Financial goals and needs are subject to adjustments over time, and to meet the varying needs of their clients, Legacy Wealth offers the following integrated financial planning services:

- Identification of life goals
- Retirement and income planning
- Estate planning
- Gift planning
- Trust services
- Tax planning
- Entrepreneur advisory services
- Stock option planning
- Charitable planning
- Insurance planning
- Education planning

Specialty Services for FedEx Pilots

Financial planning can be a complex matter when it comes to navigating contracts and benefits packages, especially for clients working within a particular career field. The Memphis financial planners at Legacy Wealth offer specialized financial planning for FedEx pilots, which includes:

- Pre-retirement and post-retirement planning
- Explanation of A-plan retirement benefit options
- PRSP retirement account management

This specialization in assisting FedEx pilots helps Legacy Wealth stand out from competing Memphis financial planners, due to their unique expertise in this area.

Additionally, the firm holds monthly, no-obligation presentations to help FedEx pilots and their spouses better understand their corporate retirement packages, supporting financial literacy and more informed money decisions.

Rating Summary

Those seeking a top financial management firm in Memphis will find Legacy Wealth to offer a variety of robust wealth management services. This advisory team's commitment to always putting clients first is an additional benefit.

A unique statistic is that 98 percent of Legacy clients choose to stay with the firm, which says a lot for how well they manage money and treat their clients.

With a commitment to trust and transparency and a client-centered philosophy, Legacy Wealth Management solidifies their 5-star rating as one of the best financial advisors in Memphis to consider partnering with this year.

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