Legacy Wealth Management, Inc. Named a 2020 Best Places to Work for Financial Advisers by InvestmentNews

Memphis, TN – May 4, 2020 – InvestmentNews has recognized Legacy Wealth Management, Inc. as a 2020 Best Places to Work for Financial Advisers. Legacy Wealth was chosen as one of this year's top-75 firms in the nation based on employer and employee surveys, evaluating company culture, benefits, career paths, and more. This is Legacy's third consecutive year to be named to the Best Places to Work list by InvestmentNews .

"For almost 40 years, our firm has been proud to serve clients across the country as a fiduciary. Client goals and satisfaction have been, and will always be, our number-one priority," says Jim Isaacs, chief executive officer. "Each Legacy client has access to a five- or six-member team of Certified Financial Planner™ professionals that is familiar with their accounts and goals, both financially and non-financially related. This team-based approach to service provides the best avenue for clients to reach one of our professionals when needed to address their needs quickly and accurately. It's a model that has served our clients and employees well over the years. During the past year, we've enjoyed significant growth of the firm, with over 1,000 clients—most recently we celebrated our 150th FedEx pilot client. Most importantly though, we continue to maintain our 98% client retention rate year over year."

Now in its third year, InvestmentNews partnered with Best Companies Group, an independent research firm specializing in identifying great places to work, to compile the survey and recognition program. "We are thrilled to identify, and commend, these 75 firms that understand the importance of a strong workplace culture," said George Moriarty, InvestmentNews chief content officer. "They are role models to the industry, in that they empower advisers to focus on delivering exceptional service to their clients."

Legacy Wealth Management, Inc. is highlighted in the April 27th issue of InvestmentNews and at bestplacesforadvisers.com.

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