

MEMPHIS BUSINESS JOURNAL



LEGACY WEALTH MANAGEMENT INC.

Delivers financial planning advice that is genuine and tailored to a client's needs

Top local official: Jim Isaacs

Employees: 18

Year founded: 1982

Average number of years each employee has been with the company: 11

Company culture?

Client-centric, collaborative, balanced, caring, family-oriented

What specific ways do senior leaders create a great work environment for employees? Everyone has a voice. We have created an atmosphere where everyone feels they are participating in the success of the organization. Senior leadership leads by example with an unwavering commitment to putting our clients' interests first. When the whole company is working toward the same goal, it eliminates internal confusion, competition and rivalries. Leaders also create a collaborative and educational culture and believe the more knowledge everyone has, the greater the knowledge of the company.

How are employees rewarded for good work? They receive ownership in the company. Individuals are promoted within their specialty area for knowledge and experience. For example, we have financial planners, senior financial planners and directors of financial planning. One-time bonuses are given for project work, as well as new business incentives.