LEGACY WEALTH MANAGEMENT | Right by you.

Legacy Wealth Management, Inc. Named to 2020 CNBC FA 100

Memphis, TN – October 6, 2020 – CNBC has recognized Legacy Wealth Management, Inc. as one of the 100 top-rated financial advisory firms of 2020 nationwide.

The CNBC FA 100 celebrates those advisory firms that top the list when it comes to offering comprehensive planning and financial services to help clients navigate their financial lives. The advisors at these firms assist in setting realistic financial and personal goals. And they will help a client stay on track to meet changing goals due to personal circumstances, and any life-changing events.

"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."

METHODOLOGY

The CNBC FA 100 ranking takes into consideration factors beyond just AUM. The ranking is based on a proprietary methodology developed by CNBC in partnership with data provider AccuPoint Solutions. It was based on data culled from thousands of advisory firms.

CNBC enlisted data provider AccuPoint Solutions to assist with the ranking of registered investment advisors for this year's FA 100 list.

The methodology consisted of first analyzing a variety of core data points from AccuPoint's database of financial services firms. This analysis started with an initial list of 37,369 RIA firms.

AccuPoint then applied weighted categories to further refine and rank the firms, ultimately creating the list of the top 100.

The primary data points used in the analysis were reviewed, either as a minimum baseline or within a range, eliminating those firms that did not meet our requirements. Once the initial list was compiled, weightings were also applied accordingly. These data points included:

- Disclosures
- Number of years in the business
- Number of employees
- Number of investment advisors registered with the firm
- The ratio of investment advisors to total number of employees
- Total assets under management
- Percentage of discretionary assets under management
- Total accounts under management
- Number of states where the RIA is registered
- Country of domicile

ABOUT LEGACY WEALTH MANAGEMENT, INC.

Legacy Wealth Management employs 22 wealth management professionals, including 13 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages over $1.57 billion in assets. The Memphis-based firm has been in business almost 40 years and provides portfolio management and financial planning services to over 1,000 clients.

# # #