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Legacy Wealth Management, Inc. Named a 2021 Best Places to Work for Financial Advisers by *InvestmentNews*

Memphis, TN—March 1, 2021—Legacy Wealth Management has been recognized as a 2021 Best Places to Work for Financial Advisers as announced by *InvestmentNews* today. This is the 4th year for the list and the 4th time Legacy Wealth Management has been included on the list.

Legacy Wealth Management was chosen as one of this year's top-75 based on employer and employee surveys delving into everything from company culture, benefits, career paths and more.

"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 is a model that has served our clients and employees well over the years. During the past year, we have 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."

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've all seen the value of a great work culture over the past year, and *InvestmentNews* is excited to once again recognize those firms that are taking a lead in providing great financial advice and being a great place to work," said George Moriarty, Chief Content Officer, *InvestmentNews*. "These firms are leading the industry in developing best-in-class human resource practices."

To learn more about the *InvestmentNews* 2021 75 Best Places to Work for Financial Advisers, please go to Bestplacesforadvisers.com.

About *InvestmentNews*

InvestmentNews is the leading source for news, analysis and information essential to the financial advisory community. Since 1998, our standard of editorial excellence and deep industry knowledge has allowed us to educate, inform and engage the most influential financial advisers. Through a weekly newspaper, website, newsletters, research, events, videos and webcasts, *InvestmentNews* provides exclusive and up-to-the-minute news, as well as actionable intelligence, that empowers financial advisers to serve their clients and run their businesses more effectively whenever, however and wherever they need it.

The *InvestmentNews* headquarters are located in New York, with offices in Washington D.C. *InvestmentNews* is part of Bonhill Group.



About Legacy Wealth Management

Legacy Wealth Management employs 22 wealth management professionals, including 13 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages over \$1.8 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.

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