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NEWS

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Legacy Wealth Management, Inc. Named to 2022 CNBC FA 100

Memphis, TN – October 4, 2022 – CNBC has recognized Legacy Wealth Management, Inc. as one of the 100 top-rated financial advisory firms of 2022 nationwide.

The CNBC FA 100 list, is a ranked list that recognizes the top advisory firms that are helping clients navigate through their financial lives.

"For 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 Duncan Miller, 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 growth of the firm, with over 1,300 clients—most recently we celebrated our 218th FedEx pilot client. Most importantly though, we continue to maintain our 98% client retention rate year over year."

The methodology for the CNBC FA 100 was prepared in partnership with data provider AccuPoint Solutions. The analysis started with an initial list of 39,818 RIA firms from the Securities and Exchange Commission regulatory database. Through a process, the list was eventually cut to 904 RIAs, with those firms meeting CNBC's proprietary criteria. AccuPoint applied CNBC's proprietary weighted categories to further refine and rank the firms, ultimately creating the list of the top 100. To learn more about the methodology, go to: CNBC.com/FA100.

ABOUT LEGACY WEALTH MANAGEMENT, INC.

Legacy Wealth Management employs 23 wealth management professionals, including 13 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages almost $2 billion in assets. The Memphis-based firm has been in business 40 years and provides portfolio management and financial planning services to over 1,300 clients.