

Legacy Wealth Management, Inc. Named a **2024 Best Places to Work for Financial Advisers** by *InvestmentNews*.

Memphis—February 28, 2024—Legacy Wealth Management, Inc. has been recognized as a 2024 Best Places to Work for Financial Advisers as announced by *InvestmentNews* today.

Legacy Wealth Management, Inc. 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 42 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 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 1,300 clients—including 218 FedEx pilot clients. 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.

To learn more about the *InvestmentNews* 2024 75 Best Places to Work for Financial Advisers, please go to <https://www.investmentnews.com/best-in-wealth/the-best-places-to-work-for-financial-advisors-in-the-usa>.

About Legacy Wealth Management

Legacy Wealth Management employs 21 wealth management professionals, including 12 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages over \$2.2 billion in assets. The Memphis-based firm has been in business 42 years and provides portfolio management and financial planning services to over 1,300 clients.

Methodology

To find and recognize the Best Places to Work for Financial Advisers, InvestmentNews and Best Companies Group first invited organizations to participate by filling out an employer form, which asked companies to explain their various offerings and practices. To be eligible, an organization must:

- 1) be a registered investment adviser (RIA), affiliated with (but not an employee of) an independent broker dealer (IBD), or a hybrid/dually registered firm affiliated with an IBD and doing business through an RIA;*

2) be based in the US;

3) have a minimum of 15 full- or part-time employees working in the US (all employees in the company should be included in the employee count, not just in the financial advising department); and

4) be in business for a minimum of one year.

Next, employers completed an in-depth questionnaire and employees were given the opportunity to offer their honest feedback by taking part in a company-wide survey. Once both portions of the assessment were complete, the *InvestmentNews* team analyzed the data to determine if an organization had what it takes to be the “best.”

To ensure credibility, organizations having 15–24 employees must have an 80 percent or better response rate on the employee survey.

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.

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