

InvestmentNews
**BEST PLACES
TO WORK 2022**
FOR FINANCIAL ADVISERS

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Legacy Wealth Management, Inc Named a **2022 Best Places to Work for Financial Advisers** by *InvestmentNews*.

Memphis—February 7, 2022— Legacy Wealth Management, Inc. has been recognized as a 2022 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 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 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 1,200 clients—most recently we celebrated our 180th 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.

“In a year that’s seen so much turmoil in the workplace – from mask mandates and canceled office reopenings to The Great Resignation – InvestmentNews is proud to spotlight those firms with a proven record of investing in their most valuable resource: their employees,” said Paul Curcio, executive editor of *InvestmentNews*. “We applaud this year’s finalists and wish them all the best in 2022.”

To learn more about the *InvestmentNews* 2022 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 23 wealth management professionals, including 13 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages over \$2.1 billion in assets. The Memphis-based firm has been in business 40 years and provides portfolio management and financial planning services to over 1,200 clients.

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