

InvestmentNews
**BEST PLACES
TO WORK 2023**
FOR FINANCIAL ADVISORS

MEDIA CONTACT: Cathy Simmons
EMAIL ADDRESS: cathys@legacywealth.com
PHONE NUMBER: 901-758-9006

Legacy Wealth Management, Inc. Named a **2023 Best Places to Work for Financial Advisers** by *InvestmentNews*.

Memphis—March 7, 2023—Legacy Wealth Management, Inc. has been recognized as a 2023 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 41 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 215 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.

"Every year, InvestmentNews is proud to profile those who prioritize taking care of their own. We applaud this year's Best Firms for Advisors winners for investing in their most precious resource: their people." said Paul Curcio, executive editor of *InvestmentNews*.

To learn more about the *InvestmentNews* 2023 75 Best Places to Work for Financial Advisers, please go to [Bestplacesforadvisers.com](https://bestplacesforadvisers.com).

About Legacy Wealth Management

Legacy Wealth Management employs 24 wealth management professionals, including 14 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages over \$1.8 billion in assets. The Memphis-based firm has been in business 41 years and provides portfolio management and financial planning services to over 1,300 clients.

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.