

2025 Financial Planning's Best RIAs to Work For
Press Release
December 11, 2025

Legacy Wealth Management, Inc. was recently named as one of the 2025 Financial Planning's Best RIAs to Work For. Legacy placed 4th out of 60. *Financial Planning* has partnered with Best Companies Group to identify companies that have excelled in creating quality workplaces for employees.

This survey and awards program is designed to identify, recognize and honor the best employers in the Money Management profession, benefiting its economy, workforce and businesses.

This year's list was compiled through a two-part review of firms across the country. First, financial professionals working inside these organizations were surveyed about leadership, compensation and benefits, communication, training, workplace environment, engagement and overall satisfaction. Separately, researchers examined each firm's policies, practices, benefit structures, systems and demographics to build a fuller picture of how each workplace operates. The combined scores determined the top firms and the final ranking. Best Companies Group managed the overall registration and survey process, analyzed the data and determined the final ranking.

To be eligible, firms had to be registered with the SEC, have at least 10 U.S.-based employees, maintain a physical U.S. location and have been in business for at least one year. Scores from the employee survey and the independent evaluation were combined to create each firm's final ranking. After tallying the results, 60 RIAs emerged as standouts — firms where employees say they feel supported, valued and excited to show up each day.

"RIAs are known for their personal service for their clients, and these firms show that they extend that to their employees as well," said Brian Wallhiemer, Editor-in-chief. "Congratulations to these companies for creating and maintaining outstanding cultures and values for their employees."

Legacy does not pay to participate in surveys nor do we receive any compensation for participating.

For more information on *Financial Planning's Best RIAs to Work For* program, visit <https://bestcompaniesgroup.com/best-rias-to-work-for/>.