

# Review of Legacy Wealth Management – A Top-Ranked Wealth Manager



ADVISORY HQ

Global Review and Ranking News Media



## Overview: Legacy Wealth Management

[Legacy Wealth Management](#) was recently ranked by AdvisoryHQ News as a top-ranked wealth management firm in Franklin, Memphis, & Nashville, Tennessee for 2021-2022.

The report below provides a top-down review and comprehensive details on the factors that enabled this firm to be ranked as one of the top wealth managers in Franklin, Memphis, & Nashville, TN for 2021-2022.

## Intro: About AdvisoryHQ News

*AdvisoryHQ News is a fast-growing global online news media that provides extensive research, reviews, and rankings of firms and products.*

*Searching for top-rated firms, services, and products can be a daunting undertaking for a consumer, especially if that consumer is unfamiliar with the landscape. AdvisoryHQ is committed to*

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*simplifying the research that consumers conduct before choosing a top provider, firm, service, or product.*

*Our review and ranking articles are always 100% independently researched and written. Firms do not pay for their ranking. In fact, most firms do not even realize that they are being reviewed by AdvisoryHQ until after our reviews have been completed and published to the public.*

*For additional information on AdvisoryHQ's methodologies, click here: [AdvisoryHQ Methodologies](#). For information on AdvisoryHQ's objectivity approach, click here: [AdvisoryHQ's Objective Process](#).*

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## Overview of Legacy Wealth Management

Serving clients since 1982, [Legacy Wealth Management](#) is a top-rated Memphis financial advisory firm that is strongly guided by a mission to always put their clients first.

The firm serves a wide range of clients throughout the country and specializes in working with FedEx pilots.

This [fee-only](#), fiduciary wealth manager in Memphis helps to simplify the complex world of investments and financial planning so their clients can focus on enjoying their lives.



## Key Factors That Enabled Legacy Wealth to Rank as a Top Financial Advisor in Memphis

### Comprehensive Financial Planning

For many clients, the best financial advisors in Memphis are those firms that offer a broad and diverse range of services.

Financial goals and needs are subject to adjustments over time, so to meet the varying needs of their clients, Legacy Wealth offers the following integrated financial planning services:

- Identification of Life Goals
- Retirement & Income Planning
- Estate Planning
- Gift Planning
- Trust Services
- Tax Planning
- Entrepreneur Advisory Services
- Stock Option Planning
- Charitable Planning
- Insurance Planning
- Education Planning



## Specialty Services for FedEx Pilots

Financial planning can be a complex matter when it comes to navigating contracts and benefits packages, especially for clients working within a particular career field. The Memphis financial planners at Legacy Wealth offer specialized financial planning for FedEx pilots, which includes:

- Pre-Retirement & Post-Retirement Planning
- Explanation of A-Plan Retirement Benefit Options
- PRSP Retirement Account Management

This specialization helps Legacy Wealth stand out from competing Memphis financial planners, due to their unique expertise assisting FedEx pilots.

Additionally, the firm holds monthly no-obligation presentations to help FedEx pilots and their spouses better understand their corporate retirement packages. This program works to support financial literacy and assist the community in making informed decisions.

## Rating Summary

Those seeking a top financial management firm in Memphis will find that Legacy Wealth offers a variety of robust wealth management services. The team's commitment to always putting their clients first is an additional benefit.



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A promising statistic is that 98 percent of Legacy clients choose to stay with the firm, which says a lot about how well the firm manages money and treats its clients.

With a commitment to trust and transparency as well as a client-centered philosophy, Legacy Wealth Management easily solidifies its 5-star rating as one of the best financial advisors in Memphis to consider partnering within 2021-2022.

## Article Link:

<https://www.advisoryhq.com/articles/top-financial-advisors-in-nashville-memphis/#Legacy-Wealth-Management-review>

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