MEMPHIS
BUSINESS JOURNAL

BPtW

10-20 EMPLOYEES

LEGACY WEALTH MANAGEMENT INC.

Financial planning firm that tailors advice to client needs

Top local official: Jim Isaacs

Local employees: 20

Year founded: 1982

Avg. number of years each employee has been with co.: 10 years

Company culture: Client-centric, collaborative, work/life-balanced

How does your company engage with employees? Free financial planning and portfolio management for immediate family — 50 percent discounted services for extended family; paid community service days; immediate vacation time for new employees; get years of credit from your prior work experience toward vacation; absences of two hours or less used for personal matters don't count toward vacation or sick time; 100 percent prepaid educational assistance program for CFP certifications and reimbursement for relevant degrees; fully company-paid certification and license renewals.

How does your actual office space create an enjoyable place to work? Employees have their own private office to concentrate on client activities. We have a large break room with refrigerators, microwaves, large ice maker, and kitchen appliances; and free coffee, tea, and filtered water. Our office building provides a full-time security guard and has gated covered parking. We close early on Fridays and provide free flu shots to employees.

How are employees rewarded for good work? They are offered ownership in the company. And, individuals are promoted within their specialty.