NEWS

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Legacy Wealth Management, Inc. Named to 2024 CNBC FA 100

Memphis, TN – October 02, 2024 – CNBC has recognized Legacy Wealth Management, Inc. as one of the 100 top-rated financial advisory firms of 2024 nationwide.

The CNBC FA 100 List, is a ranked list that recognizes the top advisory firms that are helping clients navigate through their financial lives.

"For 42 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, president, and chief executive officer. "Each Legacy client has access to a 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 to address their needs quickly and accurately. It's a model that has served our clients and employees well over the years. During the past year, we've enjoyed growth of the firm, and now have over 1,400 clients—most recently we celebrated our 225th FedEx pilot client. Most importantly though, we continue to maintain our 98% client retention rate year over year."

CNBC enlisted data provider AccuPoint Solutions to assist with the ranking of registered investment advisors for this year's FA 100 list.

The methodology consisted of first analyzing a variety of core data points from AccuPoint Solutions' proprietary database of registered investment advisors.

This analysis used an initial list of 40,896 RIA firms from the Securities and Exchange Commission regulatory database. Through a process, the list was eventually cut to 903 RIAs meeting CNBC's proprietary criteria.

CNBC staff sent an extensive email survey to all those firms that met the initial criteria to gather more details. In turn, those advisory firms filled out a comprehensive application in regard to their practice. The CNBC team verified that data with those firms and with the SEC regulatory database. AccuPoint once again applied CNBC's proprietary weighted categories to further refine and rank the firms, ultimately creating the list of the top 100 firms.

To learn more about the methodology, go to: https://www.cnbc.com/2024/10/02/cnbc-fa-100-ranking-methodology.html .

ABOUT LEGACY WEALTH MANAGEMENT, INC.

Legacy Wealth Management employs 21 wealth management professionals, including 11 CERTIFIED FINANCIAL PLANNER™ practitioners, and manages $2.4 billion in assets. The Memphis-based firm has been in business 42 years and provides portfolio management and financial planning services to over 1,400 clients.