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CUSTOMIZED WEALTH MANAGEMENT FOR YOUR FUTURE

The team at Legacy Wealth empowers clients with financial wisdom so they can experience the joys of today and faithfully manage a legacy for tomorrow. Founder and CEO Michael Brocker shares his wealth management insights.

WHAT DOES IT MEAN TO BE A BOUTIQUE FIRM?

Working as a fiduciary, we believe that independence and objectivity are critical in providing the highest-quality planning and the best possible solutions to help our clients achieve their goals. Our boutique status allows us to embrace a highly customized approach for every client. Highly personalized attention is a critical part of the value proposition we bring to clients. By building these long-term, high-trust relationships, we possess an accountability that may not be found in larger firms.

MANY ADVISORS PROVIDE COMPREHENSIVE PLANNING AND PORTFOLIO MANAGEMENT. WHAT MAKES YOUR FIRM DIFFERENT?

First and foremost, we believe that wealth management is more than just positioning a portfolio for the lowest risk with the highest return. A fiduciary advisory firm adds value in many ways that are commonly overlooked in traditional planning. The comprehensive service we provide is cohesively integrated with recommendations based on the client's unique situations and objectives. Accordingly, our asset allocation focuses on clients' needs for income and growth but also provides a high sensitivity to tax-minimizing strategies like tax-loss harvesting, gifting of appreciated assets, and other tax-efficient strategies to help optimize clients' after-tax results.

WOULDN'T ALL WEALTH MANAGEMENT FIRMS PROVIDE A SIMILAR INTEGRATED PLANNING APPROACH?

Many firms provide "planning" but will often miss opportunities to integrate wealth management with the plan itself to optimize the client's results. While many firms primarily use mutual funds or annuities, we have developed a portfolio management system that allows us to access over 900 separate account managers throughout the country. As such, we not only have strong management but also hold individual securities as opposed to only mutual funds or annuities. This allows us to leverage the tax-efficient planning to a greater degree and allows for a more competitive cost structure and greater customization. We overlay a values-based approach that filters out companies engaged in activities that are inconsistent with clients' personal values.

YOU MENTION "LEGACY PLANNING" ON YOUR WEBSITE. WHAT DOES THAT MEAN?

Most comprehensive planning firms provide estate planning, but we take it a step further by helping clients focus on not only financial efficiency but also on the legacy they will leave behind for future generations. This includes tax-wise wealth transfer ideas and speaks to the effect our clients wish to have on charities and other organizations to carry on their legacy of faithfulness in handling their finances for many generations to come.



Legacy Wealth is located at 683 Bielenberg Dr., Ste. 101, in Woodbury, MN. For more information, call 651-621-2383 or visit legacywealthwisdom.com.