LegacyWealth Management
Managing Generations of Wealth℠

Work With Us

Legacy Wealth Management is committed to helping clients find financial solutions through independent and comprehensive financial planning, tailored investment management approaches, and personalized customer service. That commitment begins with building a strong team.

Make a difference in the lives of clients and their families through your work as a financial advisor at Legacy Wealth Management.

Why Join Legacy Wealth Management?

FULL-SERVICE BOUTIQUE INVESTMENT FIRM

We set our financial advisors up for success: outstanding administrative operational support, compliance oversight, marketing expertise, and client-centric technology. With these business solutions in place, you can focus on building client relationships. Financial advisors gain access to a cloud-based CRM, as well as data aggregation and consolidated wealth reporting tools.

INVESTMENT PRODUCTS AND PHILOSOPHY

We utilize multiple custodian platforms to offer the robust investment options and customization your clients deserve. Our Investment Committee reviews our third-party money managers, investment portfolios, trading platforms, and custodian platforms on a regular basis to abide by the fiduciary standard: putting our clients' best interests at the forefront of our work.

FINANCIAL PLANNING EXPERIENCE

We have CFP® professionals on staff to help you deliver financial planning services to your clients, allowing you to provide a full range of advisory services.

MARKETING RESOURCES AND SUPPORT

We offer personalized business marketing assistance to help give you a competitive edge. Our marketing services include email marketing, social media management, website services and SEO, and client event planning. Our specialist oversees the marketing material approval process on behalf of the financial advisor, giving you more time to spend with your clients.

MODERN SOUTH FLORIDA OFFICES

We have offices located in Plantation and Miami to accommodate financial advisors and clients based in both Miami-Dade and Broward counties. Our conference rooms are equipped with monitors to easily present meeting material. Snacks and beverages are made available to all guests of the office. Advisors have 24/7 access to our main office in Plantation, so each person can work on their own schedule.

Follow us on
Social media

1250 S Pine Island Rd, #350
Plantation, FL 33324

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800 519 4015

954 474 7399

lwmfl.com

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SECURE, INNOVATIVE, AND COLLABORATIVE TECHNOLOGY

We offer extensive cybersecurity support, giving you and your clients the confidence that important information is kept safe. Security measures include computer encryption, office alarm system, and routine third-party security audits. Our mobile phone system allows on-the-go financial advisors to receive business calls outside of the office. Additionally, financial advisors may use interactive financial planning software with their clients, granting clients of their choosing a personal wealth management portal.

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How Are We Different?

GROUNDED IN INTEGRITY, TRANSPARENCY AND EXPERIENCE

Our firm is led by Managing Principal Tony DuBose, an industry veteran of 25 years, and Managing Director Joel Palatnik. LWM has been in business 23 years, and our team has over 175 years of combined financial advisor experience working with complex financial matters.

A CULTURE THAT DRIVES SUCCESS

Our mission to have a positive impact on the lives of our clients and their families starts with our team. Experience our positive and friendly company culture every day, as well as at our biannual team retreat and optional monthly team events. We keep a well-stocked kitchen with snacks for staff to partake. Community involvement is important to us: we regularly give back to our community through philanthropy or volunteer work.

A DIVERSE TEAM

Our team members hail from three continents and have lived and studied around the world. We represent many cultural backgrounds and ages (across six decades, in fact), and speak multiple languages between us. We bring different viewpoints to the table, and these differences are welcomed.

Call Tony DuBose or Joel Palatnik at (954) 474-7100 to discuss becoming a financial advisor at Legacy Wealth Management and make a difference in your life and the lives of clients and their families.

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