LEGACYpcs
Legacy Private Client Services, LLC

Specific Services Offered

Focus on Best Fit Relationships
We pursue and maintain best fit relationships through personal introductions only, which are built on a foundation of value, mutual respect and a commitment to help one another. Our fee-based (not fee only) structure allows us to conduct business without the need to “make a sale” to be compensated, while permitting us to stay true to our roots and core competencies by offering valuable products and services where appropriate.

Fee-based Advisory Planning
In the capacity of a fiduciary, we offer macro-level financial planning, focused on wealth transfer and philanthropy through our Registered Advisor Affiliate, Eagle Strategies, LLC.

Tactical Solutions Modeling
Occasionally, situations do not warrant strategic fee-based planning, yet still have potential for significant enhancement. In these circumstances we offer tactical solutions modeling.

Life Insurance Solutions for the Affluent
We specialize in offering life insurance solutions that integrate with planning strategies used by the affluent. Strategies generally include (1) low premium high death benefit policies where cash value is secondary, (2) high cash value policies where death benefit is secondary, and (3) hybrid strategies available that include some sort of both for flexibility in planning. Product offerings are through New York Life and a number of additional carriers via brokerage.

Income Planning
We offer proprietary analytics based on Ibbotson/Morningstar research and modeling that goes beyond customary systematic distributions that relies on asset allocation modeling based on historical averages.

Investment Services
We have the capacity to provide a wide variety of solutions, including offering fee only services with independent investment management firms, through our Registered Advisor Affiliate, Eagle Strategies, LLC.

Corporate Fiduciary Services
When appropriate, we can provide access to corporate trustee services independent of the investment and insurance arm of the trust company. These services are intended to focus on the fiduciary role only, with the purpose of facilitating continuity in your planning at a time when it is needed most.

On-going Private Client Services
For clients who embrace the notion of treating the family wealth as a business, we offer on-going fee-based planning services, born from studying family office services at NYU’s Family Wealth Institute in the early 1990’s and developed over two decades. Our process integrates cutting edge technology with our intellectual capital to help private clients manage their wealth enterprise.

Neither LEGACY*pcs* nor Eagle Strategies LLC provides legal or tax advice.

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