

Serving the Advisor Serves the Client

We empower advisors to elevate their clients' financial futures with a complete foundation of support that allows them to run their practice as they desire.

Advice is provided by the advisor



Your Financial Advisor
Local Team and Client Support

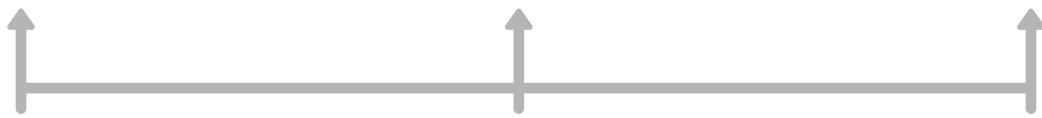
Our diverse network of local advisors and their teams are responsible for helping their clients meet their goals and investment objectives. Operating as independent business owners leveraging the Concurrent platform, each partner firm has the opportunity to build its own brand and unique culture and to contribute its expertise to the collective.



The platform is provided by Concurrent



Concurrent serves as a platform for advisors, providing compliance, supervision, operational support, investment due diligence, technology, and access to leading custodians, a broker-dealer, and banking and trust services. We continuously seek out best-in-breed solutions, leverage competition amongst vendors, and are constantly reinvesting to fulfill our fiduciary duty to clients ensuring that each advisor is independent but never alone.



Custody/Broker Dealer

Privately held for more than 75 years, Fidelity Investments is one of the world's largest and most respected financial services firms, with more than \$11.1 trillion in assets under administration, as of March 2023.

As a leading independent broker-dealer, PKS facilitates our ability to conduct commissionable transactions where appropriate.



Solutions

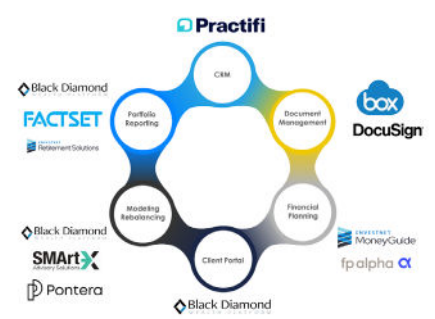
Our culture of collaboration opens the door to a network of specialists aligned to round out a holistic wealth management experience. Concurrent provides robust support and access to solutions in the areas of:

- Financial Planning
- Asset Management
- Alternative Investments
- Insurance



Technology

The Concurrent platform offers you and your advisor best-in-class technology.



Learn more about what makes us different.

www.legacypwp.com

Fidelity Investments is an independent company unaffiliated with Concurrent Advisors ("Concurrent"). Fidelity is a service provider to Concurrent. There is no form of legal partnership, agency affiliation, or similar relationship between Concurrent and Fidelity, nor is such a relationship created or implied by the information herein. Fidelity Investments provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC. 1091344.1.0.

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