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

LEGACY
PRIVATE WEALTH PARTNERS
Powered by CONCURRENT

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

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.

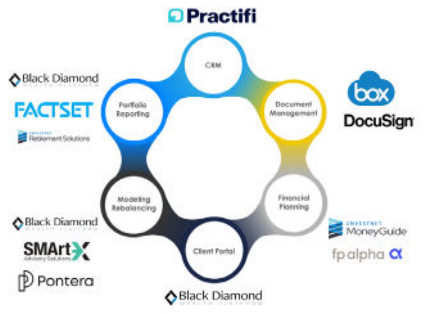
Solutions

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