Legacy One Financial Advisors
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E: info@legacy1fa.com

Please contact us today to schedule a meeting to discuss your future.

Austin Office:
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#3210
Austin, TX 78759
T: 212-342-0202

Georgetown Office:
2004 Williams Drive
Georgetown, TX 78628
T: 512-864-0721

YOUR LIFE. YOUR LEGACY. OUR EXPERTISE.

You are unique. Your financial plan should be too.

Our advice is tailored for your current life plan with a focus on your future goals. Wherever you are in your financial journey, our advisors aim to help you design an investment strategy to meet your needs and to leave a lasting legacy.

Collaborative, Goals-Based Wealth Planning

- Investment Advisory Services
- Asset Management
- Cash Flow Management
- Portfolio Analysis and Construction
- Retirement Planning
- Real Estate Guidance
- 401(k) Investments
- Education Plans (529 Plans)

Wealth Protection Planning

- Life Insurance needs
- Health and Disability Insurance needs
- Liability Protection
- Umbrella Coverage

You Deserve Honest Advice and Transparent Investment Solutions.

As a "fee-only" independent financial advisor, Legacy One seeks out the most effective product solutions for you. We believe in multi-asset class investment solutions and are not constrained by any third-party relationships. Your portfolio allocations are determined by your stated objectives and your risk profile.

Your Legacy and Estate Planning

- Asset Distribution
- Generational Wealth Transfers
- Ensure Estate Documents are in Good Order
- Assist with Texas probate code
- Trust Assistance
- Business Succession Planning

Effective Use of Your Money

- Income Planning
- Cash Flow Planning
- Tax Efficiency Planning
- Business Transaction Planning
- Gifting to family, friends, charitable organizations

Legacy One provides you with Experience, Expertise and Care

- Independent SEC Registered Investment Advisor
- Fiduciary Standard (which means Your Interests Come First)
- Texas-based – offices in Austin and Georgetown
- Founder has 26 years of experience
- 20+ team members with extensive expertise and credentials (CFP®, MBA, JD, CPA, CPWA, AEF, Insurance and Securities licensed)
- Dedicated Advisors and Client Service Managers available to you
- Manage over $1 billion in client assets
- Dedicated to helping you achieve your life goals