Retirement

Wealth Management

Education Savings

Estate Planning

Over the course of your lifetime, investments will play a variety of roles. Whether it's starting a new business, providing for your children, planning for your retirement or leaving a legacy behind, you need a true partner in planning your financial future.

YOU need
Legence Investment Services.

Contact Us

Legence
Investment Services

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Legence®
Investment Services

Your PARTNER in Financial Planning

I have money to invest. Where do I begin?

Investing is the first step toward building a more financially stable future. We are glad to hear you are ready to take the next step.

It begins with a face-to-face meeting to discuss your investments and your financial goals. Our professional financial advice is crafted with a personal approach and customized solutions.

Legence® Investment Services

Your trusted financial PARTNER now offers expanded INVESTMENT SERVICES to assist in achieving your GOALS.

Ask yourself...

- Am I on track for the retirement I desire?
- Does my portfolio fit my risk tolerance?
- Is my estate in order, should something happen to me?
- Are there upcoming education needs that I should be saving for?
- Is my current advisor providing the level of service that my financial future deserves?
- Are there foreseeable significant changes in my financial future?

LEGENCE INVESTMENT SERVICES offers free personalized financial consultations.

We can help you with:

- 401(k) Rollovers
- Traditional & Roth IRAs
- Education Savings
- Employer-Sponsored Retirement Plans
- Stocks, Bonds, Mutual Funds, Annuities
- Retirement Income Planning
- Long-Term Care and Life Insurance
- Investment Advisory Services
- Charitable Gift Planning
- Much More

Call our team TODAY to get started on your financial plan.

LegenceInvestmentServices.com

YOUR Partner In Planning Your Financial Future