FACT SHEET

www.legend-financial.com

Legend Financial Advisors, Inc.®

Fee-Only, Fiduciaries

A FEE-ONLY, FIDUCIARY ADVISORY FIRM

Legend Financial Advisors, Inc.® (Legend) is a **Fee-Only**, **Fiduciary** U.S. Securities and Exchange Commission Registered Investment Advisory Firm with Its Headquarters Located in Pittsburgh, Pennsylvania. Legend provides Personalized Wealth Management Services including Financial Planning and Investment Management Strategies to Individuals and Families.

Legend and its Advisors are Governed by the Fiduciary Standard of Law. As a **Fiduciary**, Legend Works in Their Clients' Best Interests.

THREE REASONS TO CHOOSE LEGEND

Listed below are three key facts that explain how Legend is different from its competitors.

1. Legend and their financial advisors owe a fiduciary duty to their clients. The fiduciary duty is a high standard, and requires Legend to act solely in the best interest of their clients.

2. Legend designs dynamic, creative and personalized financial planning and investment solutions for its clients.

3. Legend emphasizes low-cost investments where possible that are allocated and traded in an income tax-efficient manner.

FREE ONE TIME SERVICES

Free Retirement Analysis

Free Investment Second Opinion

Free Stock Market Crash Analysis

Free Portfolio Tax-Efficiency Analysis

FACTS ABOUT LEGEND'S HISTORY

1. Legend was Incorporated on July 26, 1993 as a Pennsylvania Corporation.
2. It was Granted Registration as an Investment Advisor on September 14, 1993 by the U.S. Securities and Exchange Commission.
3. Legend was Granted Registration as an Investment Advisor on January 6, 1994 by the Pennsylvania Securities Commission.
4. Legend Formally Began Operations on January 10, 1994.
5. The Firm is Independent and 100% Employee-Owned.

WEALTH MANAGEMENT ADVISORY SERVICES

1. Personal Investment Management and/or Investment Consulting
2. Personal Financial Planning (Available Only if Legend is Retained for Investment Services)
3. Retirement Plan Investment Management and/or Investment Consulting
4. Non-Profit Organization Investment Management and/or Investment Consulting
5. Business, Dental or Medical Practice Financial Planning

WHO WE SERVE

Client Specializations:

Legend has developed services addressing specialty client-types for Personal Financial Planning and Investment Management/Consulting services. These specialty-type clients include

Medical Doctors / Practices	College Professors & Administrators
Pre– and Post-Retirees	Dental Professionals
Widowed Individuals	Post-Divorce Individuals
Business Owners / Entrepreneurs	Technology Professionals
Individuals and Families	Corporate Executives
Retirement Plans	Sudden Wealth Recipients