About Legend Financial Advisors, Inc.®

Legend Financial Advisors, Inc.® (Legend) is a Fee-Only[1], Fiduciary U.S. Securities and Exchange Commission Registered Investment Advisory Firm with Its Headquarters Located in Pittsburgh, PA. Legend provides Personalized Wealth Management Services including Financial Planning and Investment Management Strategies to Individuals and Families.

Why Legend

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 their clients.

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

[1]See Legend's Fee-Only Disclosure on Legend's Website.

5700 Corporate Drive, Suite 350
Pittsburgh, PA 15237
Phone: (412) 635-9210

www.legend-financial.com

Fee-Only, Fiduciaries

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Mutual Rewards

Benefits for:

- **You And The Client You Referred Us**
- **Your Favorite Charity**
- **Legend Financial Advisors, Inc.®**

Because We Care...

Mutual Rewards

A Client Referral Program: Mutual Rewards

We invite you to participate in our Mutual Rewards program, specifically designed for our clients only. Through this program, if a new prospective client is referred to us and that individual ultimately becomes a client of Legend Financial Advisors, Inc.® (Legend), we will donate $500.00 to the charity of the referring client's choice. The only qualification is that the charity or organization must have 501(c)(3) status (most charities and religious organizations qualify).

Who Do I Refer?

1. Individuals who have had poor investment returns
2. Individuals who pay high fees and/or commissions
3. Individuals with complex financial situations
4. Individuals in the process of changing their employer or retiring
5. Pre-Retirees and Retirees concerned about outliving their monies
6. Individuals who have come into sudden wealth
7. Retirement Plans that require investment management by a Fiduciary
8. Investors who utilize a Broker or Fee-Based (earns commissions from product sales) Advisor
9. "Do-It-Yourself" investors who need professional investment management
10. Individuals who are selling or have sold their business

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
Widowed Individuals	Dental Professionals
Pre– and Post-Retirees	Post-Divorce Individuals
Business Owners / Entrepreneurs	Technology Professionals
Individuals and Families	Corporate Executives
Retirement Plans	Sudden Wealth Recipients

Life is for Giving! We can help!

Contact Us:

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