



Merchant-Backed Legacy Capital Aligns with \$650MM Northwest Arkansas Team
Team strengthens Legacy's position as one of Arkansas' largest independent wealth management firms

March 1, 2023 – Little Rock, Ark. – [Legacy Capital](#), an Arkansas-based Registered Investment Advisor (RIA) and wealth management firm, today announced the opening of its Northwest Arkansas office with the addition of Brian Wood, CFA[†], Michael Peebles, CFA[†] and DeAnn Gann, CFP[†]. This will further expand Legacy's geographic footprint and strengthen Legacy's position as one of the largest independent wealth management firms in Arkansas, with over \$1B in assets under management and advisement and more than \$2.5B of in-force life insurance.

At Legacy, the team will offer holistic wealth management services to high-net-worth and ultra-high-net-worth families, ranging from asset management and investments to financial and estate planning, banking and trust services, and insurance solutions.

"Legacy Capital's core values and client-centered approach are a perfect fit for how we strive to advise and serve our clients," said [Brian Wood](#), Managing Partner, Northwest Arkansas at Legacy Capital. "Legacy's independent and robust service offering will provide our team with the resources to enhance what we can offer to the families we serve and further provide a platform to continue to scale and enhance wealth management services for the NWA region."

"Legacy's business philosophy is built upon the quality of the people we hire and partner with and what drives our approach to deliver the best possible client experience," added [Matt Jones](#), President of Legacy Capital. "We could not be more excited about partnering with Brian and Mike and their team to establish our presence in Northwest Arkansas, one of the fastest growing and most dynamic areas in the country."

"We are thrilled to welcome Brian, Mike, DeAnn and the entire Legacy Capital team to the Fidelity platform and help expand their clients' access to a broad set of products and services," said [John Phillips](#), Head of Platform Sales at Fidelity Institutional Wealth Management Services. "This is an exciting milestone for the team, and we look forward to supporting the firm's continued growth and steadfast focus on helping their clients accomplish their goals."

Legacy Capital has provided comprehensive wealth management services to individuals and families since 1977, including financial planning, asset management, legacy and estate planning, and insurance solutions. Backed by [Merchant Investment Management](#) since 2018, Legacy Capital has doubled its AUM since its 2020 [merger with Trent Capital](#), serving 400 households with 20 staff.

[Tim Bello](#), Managing Partner and Co-Founder of Merchant, added, "Matt and the team at Legacy Capital were one of Merchant's first partners, and it's been remarkable working with them and growing the firm. The Northwest Arkansas region will now have access to a best-in-class team for all their financial planning needs, backed by the Legacy and Merchant brands."

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ABOUT LEGACY CAPITAL

Based out of Little Rock, AR, Legacy Capital and its affiliated businesses have provided comprehensive wealth management services to affluent and ultra-affluent individuals and families since 1977. These services include holistic financial planning, asset management, estate and legacy planning and life insurance solutions. Since 2018, Legacy has been backed by minority partner Merchant Investment Management of New York to provide strategic guidance and resources to

expand its service platform, expand infrastructure and geographic growth plans. Legacy Capital is an SEC Registered Investment Advisory firm. For more information visit www.LegacyCapitalWP.com.

ABOUT MERCHANT

Merchant is a private partnership providing growth capital, management resources, strategic opportunities and direction to independent financial services companies, particularly those focused on wealth and asset management. For additional information, please visit merchantim.com.

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