

40 Years Experience in Estate Planning

Legacy Legal Plan is the result of almost 40 years experience as a financial advisor offering estate-planning services. Our management team has delivered quality estate-planning services legally as a traditional commission-based insurance agency, as a Securities Principal, as a fee-for-service Registered Investment Advisor, and finally as Plan Administrator of Legacy Legal Program.

First Hand Experience with Regulatory/Compliance Reviews

Over the years we have been exposed to numerous regulatory reviews by the SEC, by the Bar, and by the Attorney General of California. We have learned valuable lessons from each review. In addition and most importantly Legacy Legal Program offers the experience learned from the day-to-day servicing of over 70,000 estate plans.

Our History

Legacy Legal Plan traces its beginnings back to September 1980 with creation of the Foundation for Financial Education (FFE). Initially FFE was a speaker's bureau located in San Diego, California. From 1980 to 1989 FFE sponsored thousands of financial seminars throughout Southern California and the Southwest. By 1993, FFE focused solely on providing quality estate-planning services at the lowest possible cost and acted as the plan administrator of Legacy Legal Program, a group legal plan with over 100,000 member-clients.

Legacy has the benefit of the lessons that can only be learned by servicing thousands of estate plans. Creating the initial documents is the easy part. Providing on-going services to make sure each plan is current and up-to-date is much more difficult. Making sure that your estate plan accomplishes what you intended, and that survivors and beneficiaries are well served when someone dies, is really what Legacy Legal Plan is all about. To meet the goal Legacy was restructured as Legacy Estate Planning and Administration, Inc. in 2011.