

Legacy Wealth Management

Managing Generations of Wealth™

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Gary R. Polk has lived in South Florida his entire life. After graduating from the University of Florida with an accounting degree, he worked with the IRS as an examining revenue agent and then as a CPA with two local public accounting firms, specializing in taxation. His work in the financial services industry dates back to 1985. Over the years Gary worked at a pension consulting firm and with two major life insurance companies, Guardian Life and Mutual of New York.

Gary has spent the majority of his career helping clients plan for retirement by growing and preserving their assets and future income while reducing risks and taxes. His expertise in family and business risk management makes his advice invaluable to clients considering the possibilities: living a long life, dying too soon, living with a significant disability, or caring for a loved one with special needs.

Gary enjoys helping individuals, families, and business owners understand the principles of and considerations that go into sound financial planning, and he welcomes opportunities to do so via face-to-face conversations as well as in public venues. He is a popular speaker for groups and organizations on an array of topics, has hosted a local radio show called "Tax Free Retirement," and has contributed to a business column in The Miami Herald called "Ask the Experts."

Gary holds the following professional designations: CERTIFIED FINANCIAL PLANNER™ (CFP®), Certified Senior Advisor (CSA), Certified in Long-Term Care (CLTC), Chartered Financial Consultant (ChFC®), and Chartered Life Underwriter (CLU). These credentials reflect Gary's commitment to his career and business, with the ultimate goal of providing the best service to his clients.

Gary is an avid sports fan, supporting his local teams, the University of Miami, University of Florida, Miami Dolphins and Miami Heat. He also appreciates the martial arts. Gary obtained his black belt in karate in June, 2011 and occasionally teaches karate in his spare time. Gary lives in Davie with his wife Donna, teenage daughter, Marlee, and Golden Lab, Rusty.