

Legacy Wealth Management

Managing Generations of Wealth™

Legacy Wealth Management
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Randy Lifshotz

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Randy Lifshotz Randy developed his philosophy for helping his clients define and implement their most important financial goals through his passion for touring the world on his motorcycle. He views his clients' financial journeys just as his two-wheeled journeys:

- 1) Where we would like/need to go?
- 2) How much time we have to get and stay there?
- 3) What kind of roads we'd like to take?
- 4) How much it will cost?

Throughout his twenty-plus years advising clients, Randy believes the foundation of his success comes not only from his degree in education and five years teaching experience but from his community involvements as well. He is a member of the Gold Coast Jazz Society and actively participates in fund-raising efforts with the Pediatric Brain Tumor Foundation.