Legacy Wealth Management
Managing Generations of Wealth™

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Sonja Koppenwallner, is a CERTIFIED FINANCIAL PLANNER™ CFP® and Wealth Advisor and has worked closely with her clients to pursue their financial goals since 2005. Her areas of specialty include, but are not limited to: Wealth Management and Strategic Asset Allocation, Retirement Planning, Protection Planning, Tax Strategies, Work Benefit Analysis, Divorce Planning and Estate Planning.

Sonja believes that the key to financial success involves a systematic approach that includes the review, implementation, and follow-up of your financial plan. By educating and clearly communicating with her clients she believes they will be empowered to understand and have confidence in meeting their financial objectives.

Sonja's extensive knowledge, guidance, and experience assist clients in defining their financial future.
With the client in mind, she formulates a personalized plan that includes all areas of financial planning and is based on their specific needs. From individuals and families to businesses and corporations, Sonja can help you execute your financial goals.

Sonja graduated from Wesleyan University, Middletown, Connecticut with honors in psychology. She began her career in the industry with one of the largest financial planning firms prior to joining the Legacy team. In 2008 she acquired the prestigious CERTIFIED FINANCIAL PLANNER™ designation, which is the recognized standard of excellence for financial planning.

She resides in Plantation, Florida, and competes at the local, national, and international levels in Triathlon. If you are open-minded to a second opinion regarding how you might better yourself financially, please give Sonja a call.