

# NEWS

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## Legacy Capital and Trent Capital Complete Merger

*Little Rock companies join forces to create one of Arkansas' largest independent wealth management firms*

**Little Rock, Ark. (Jan. 05, 2021)** – [Legacy Capital Wealth Partners](#) and [Trent Capital Management](#), two independent, Arkansas-based wealth management firms, announced today that they have merged to form one of the largest independent Registered Investment Advisory firms in the state. The merged firm, which will have over \$525,000,000 in assets under management and advisement and in-force life insurance of over \$2.5 billion, will be known as Legacy Capital. Headquarters will remain in Little Rock. The merger became official on December 31, 2020.

Legacy Capital, an SEC Registered Investment Advisory firm, has since 1977 provided comprehensive wealth management services to individuals and families, including financial planning, asset management, legacy and estate planning as well as insurance solutions. Trent Capital Management, Inc. (TCM), is an SEC Registered Investment Advisory firm founded by David Trent in 1996.

“This is a significant positive event for all of our clients and advisors as well as for all of the dedicated people who make up our Legacy Capital team,” said President Matt Jones, JD, CFP®. “With this merger and the integration of David Trent and the great team that he has built, I believe we have created an organization that will provide the highest level of service and advice to the affluent and ultra-affluent in our state and region.”

“This merger has energized me and convinced me more than ever that we are poised to continue to grow and add even greater value to our loyal clients,” said David Trent. “TCM and Legacy both have long histories of outstanding service to our clients. I have known Legacy’s President, Matt Jones, personally and professionally for over 20 years and have tremendous respect for the organization and clientele that he and Jason Prather have built. We are all incredibly excited about the integration of our teams and the synergies this merger has created.”

“With the merger, we have increased our focus on building the region’s most sophisticated wealth management firm – one that will also attract other client-focused advisors who are looking for a better alternative to how they serve their clients,” added Jones. “We believe we have built a unique organization for high-end advisors who desire a truly independent and locally managed wealth

management firm with a culture focused on putting the clients' interests first. We will remain a client-focused firm run by advisors and for advisors and their clients."

### **Legacy Capital clients and advisors have access to:**

- One of the largest and most sophisticated money manager platforms in the country as well as several in-house managed portfolios and strategies
- An in-house financial and estate planning team including:
  - Two non-practicing CPAs
  - Two non-practicing attorneys (one with a Master's in tax law)
  - Two CFPs and several professionals with investment and insurance expertise
- Access to institutional quality alternative investments including private equity, hedge funds, private lending, and others
- A Chief Operating Officer who spent 10 years as CFO of an organization with a \$1 billion budget and 10,000+ employees
- The combined resources with a team of 19 professionals and support staff that will have combined assets under management and advisement of over \$525 million and in-force life insurance of over \$2.5 billion
- State-of-the-art technology including portfolio management software, online reporting as well financial planning resources and software
- An in-house life insurance and disability division including a full-time medical underwriter with an FALU designation
- A commitment to continue adding resources and services to enhance the client value proposition and experience

"Combining resources positions us to thrive and grow beyond the careers of the founders and current owners/leaders to serve our clients and families for generations to come," said Trent. "We have spent many hours over the last few months with Legacy's team and truly feel this is a BIG win for both of our firms' clients as well as our existing and future advisors."

### **ABOUT LEGACY CAPITAL WEALTH PARTNERS**

Legacy Capital Wealth Partners, originally part of the Legacy Capital Group, has been providing wealth management, legacy planning, and risk management services to individuals and families since 1977, helping them address the unique needs of clients with significant wealth. Headquartered in Little Rock, Arkansas and led by partners Matt Jones and Jason Prather, the firm offers the personal attention of a locally-owned firm with national resources. They focus on helping people build their legacies and manage the complexities of wealth. Legacy Capital is an SEC Registered Investment Advisory firm. For more information visit [www.LegacyCapitalWP.com](http://www.LegacyCapitalWP.com).

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