



**LEGACY RETIREMENT**  
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## PRESS RELEASE

For Immediate Release  
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Legacy Retirement Plan Advisors welcomes Val Ortega from HRB Retirement

Plantation, Florida August 1<sup>st</sup>, 2022 – **Legacy Retirement Plan Advisors**, a wholly owned subsidiary of Legacy Wealth Management, is proud to announce and welcome Val Ortega as the company’s new Head of Retirement Plan Consultants. Val will be responsible for driving continued growth for the firm, strategically enhancing its footprint in the Employee Retirement Benefits space, and overseeing product and vendor selection, as well as overseeing sales and servicing for the firm’s existing book of business.

Val joins the **Legacy Retirement Plan Advisors** team from HRB Retirement, a South Florida leading Benefits Firm. It was at HRB Retirement that Val served as partner and Head of Retirement Plans Sales and Servicing. During Val’s successful tenure at HRB Retirement, she directed sales and business development efforts for the firm, specifically targeting mid-and-large size closely held corporations; both in Florida and throughout several states all around the United States.

Val is a retirement plan specialist having served thousands of organizations in designing, implementing, and providing on-going assistance in their retirement planning needs. Val’s experience spans more than 20+ years in the employee benefits field. Val has spent the last 15+ years focused exclusively on facilitating organizations with their retirement plans, working for various Recordkeeping Platforms. Recognizing a need for retirement plan experts in a field with on-going changes and challenges, she is a fierce advocate for the firms she serves, and her experience allows her to share distinct insight and expertise to create customized strategies for the companies that entrust Val with their employee retirement planning benefits.



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Over the span of her professional career, Val held leadership and executive roles in industry leading financial services firms like John Hancock and Nationwide Insurance. Val's grit, passion, and pursuit of excellence in everything she undertakes; allowed her to thrive in these world-class organizations through various sales and management roles. Most importantly, Val's commitment to her clients and plan participants over the years; have made her a true advocate for those who may have had limited access to financial advice and guidance.

Val utilizes her wealth of knowledge and experience to assist companies in managing, addressing, and pursuing their retirement needs (and those of their employees, owners, and associates). She specializes in:

- Keeping proper due diligence procedures and documentation
- Benchmarking plans for pricing and negotiating with providers
- Investment menu selection and on-going monitoring
- Providing high touch bilingual education

Val is passionate about traveling and has been to over 50 countries! She has her hands full with her husband and three young boys. She also serves on the board of Centro Mater Foundation, an organization that provides high quality education to low-income immigrant families. Val is passionate about this cause because her parents immigrated to the United States and raised a young family and she highly values education.

Please direct any inquiries and questions about this release to Tony DuBose (954) 414-0901 or by email: [tony.dubose@lwmfl.com](mailto:tony.dubose@lwmfl.com).