Heritage Family Offices, LLP combines Tax, Law, Wealth Management, and Insurance practices to provide a specialized family office experience.

Our ultimate goal of helping our clients build and preserve wealth is achieved by collectively focusing Asset Preservation, Financial Planning, and Investment Management through the common lens of Strategic Tax Planning.

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Heritage Family Offices, LLP is a professional association comprised of four legally independent professional practices: HFO Certified Public Accountants, LLP; HFO Law Group, LLP; Heritage Insurance Advisors, LLC; and Heritage Wealth Management, LLC.

We believe our clients are best served by integrating the primary financial professionals in their lives. Together, our family of companies provides our clients with CPAs, tax professionals, attorneys, financial advisors, insurance specialists, and CERTIFIED FINANCIAL PLANNERS™. Please note, however, that not all professionals maintain all these licenses. Please carefully take note of our respective professional licenses, or ask for clarification, when engaging any professional in our firm. Our goal is to provide continuous, full-transparency for our clients or prospective clients.

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