

## HOLISTIC PROCESS

A sound financial plan starts with a well-defined process.

**Five steps to a financial plan (<https://www.heritagefinancialcounselors.com/family-financial-counseling/holistic-financial-planning-process/>)**

## FINANCIAL COUNSELORS FOR LIFE

We believe life's purpose is to serve others with sincerity, humility, trust, humor and intellect. Our professional mission is to help individuals, couples and families develop holistic and comprehensive financial plans.

As your most trusted financial counselors we help you deal with life's challenges, both big and small; life's transitions, both planned and unplanned; and life's emotions, both joyful and sorrowful. Our financial counseling approach provides you with clarity regarding financial matters, so you can focus more purposefully on life matters.

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Check the background of investment professionals associated with this site on FINRA's BrokerCheck (<http://brokercheck.finra.org/>).

## HEAR OUR STORY



Charlie and Nancy: Your Financial Counselors for Life  
(<https://www.heritagefinancialcounselors.com/our-story/>)

## MEET OUR TEAM



Experienced CERTIFIED FINANCIAL PLANNER™ Professionals

(<https://www.heritagefinancialcounselors.com/about/experienced-team-cfp-professionals/>)

## CONTACT US TODAY



Ready to get started? We look forward to meeting you

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**Your first financial  
counseling session is free  
(/complimentary-financial-  
counseling-session/)**

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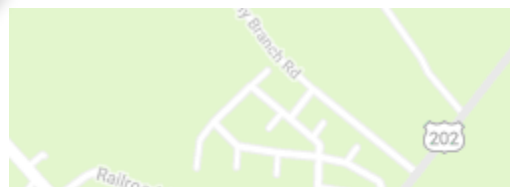
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